Intérêt porté aux activités touristiques axées sur l'horticulture

Intérêt porté aux activités touristiques axées sur l'horticulture

- Contexte -

Des ministères et des organismes de tourisme du Canada se sont associés pour effectuer deux importantes études d'évaluation des activités et des éléments de motivation en matière de voyages d'agrément chez les Canadiens et les Américains.

Cette enquête, intitulée Enquête sur les activités et les préférences en matière de voyage (EAPMV), représente une évaluation approfondie des comportements et des éléments de motivation en matière de voyages et fournit une base de données riche et sérieuse pour élaborer des stratégies de commercialisation et créer des produits de voyage visant à attirer des touristes au Canada et en Ontario.

La série d'analyses actuellement en cours s'appuie sur la base de données de l'EAPMV pour examiner les tendances du marché et les facteurs qui motivent le comportement en matière de voyages. L'EAPMV, qui comprenait une enquête par téléphone et une enquête par courrier-réponse à laquelle les répondants devaient répondre, a été menée au Canada et aux États-Unis du 27 septembre 1999 au 16 avril 2000. L'enquête par téléphone a été menée auprès de 28 397 personnes aux États-Unis et de 18 385 personnes au Canada. Les répondants ont été choisis au hasard dans des ménages. On a demandé aux participants à l'enquête par téléphone qui avaient voyagé au cours des deux années précédentes ou qui souhaitaient faire un voyage au cours des deux prochaines années de remplir un questionnaire par courrier-réponse. En tout, 40 271 personnes se sont qualifiées pour le questionnaire par courrier-réponse. Sur ce nombre, 11 892 personnes (29,4 %) ont renvoyé le questionnaire dûment rempli. Le taux de réponse au questionnaire a été plus élevé au Canada, soit 5 490 personnes (35,2 %), qu'aux États-Unis, soit 6 405 personnes (26,0 %).

L'étude actuelle porte sur l'intérêt que suscitent les jardins botaniques et les attractions horticoles, comme Cypress Gardens ou Tivoli Park. La base de données a servi à cerner les segments de marché qui ont visité un jardin botanique lors d'un voyage au cours des deux dernières années ou ont exprimé un intérêt à l'égard de ce genre d'attraction. Ce rapport fournit un profil démographique, les activités des Canadiens en matière de voyages, les intentions de voyage des Canadiens, les expériences de vacances recherchées au cours des deux années précédentes, les activités de vacances auxquelles les répondants ont participé au cours des deux années, les habitudes de consommation de médias, les sources d'information consultées pour planifier de brèves ou de longues vacances ainsi que les impressions à propos du Canada et de l'Ontario en ce qui a trait à l'intérêt porté aux attractions horticoles. Ce rapport illustre également le marché éventuel global et cerne les secteurs offrant les plus grandes possibilités quant à la commercialisation, à la publicité et la promotion des attractions touristiques horticoles au Canada et en Ontario.

Intérêt porté aux activités touristiques axées sur l'horticulture
- Principales conclusions -

Un quart des Canadiens et des Américains d'âge adulte indiquent qu'ils ont visité pendant un voyage effectué au cours des deux dernières années un espace jardiné ou un jardin botanique. Les Canadiens (14,2 %) étaient plus susceptibles que les Américains (10,7 %) de s'intéresser à l'avenir à ce genre de loisirs pendant leurs vacances. Parmi les Canadiens, les touristes de Colombie-Britannique et du Québec étaient les plus susceptibles d'avoir visité une attraction horticole pendant un voyage effectué au cours des deux dernières années. On trouvait le pourcentage des visites le plus faible en Saskatchewan et en Nouvelle-Écosse. Aux États-Unis, on relevait le taux de visites d'attractions horticoles le plus important dans les régions méridionales (p.ex. Atlantique méridional, Centre sud-est, Centre sud-ouest et régions montagneuses).

Les visites d'attractions horticoles pendant un voyage augmentent avec l'âge, l'éducation et le revenu. D'après les visites effectuées dans des lieux horticoles, le principal marché se compose des couples aisés d'âge mûr et âgés. Parmi les autres segments du marché qui portent un intérêt supérieur à la moyenne à ce genre d'attractions, citons les célibataires aisés d'âge mûr, les couples âgés et les couples d'âge mûr à revenu moyen. Ces segments représentent au total 30,4 % du marché canadien et 29,8 % du marché américain.

Les personnes en voyage qui ont visité une attraction horticole au cours des deux dernières années étaient plus susceptibles d'avoir recherché des activités d'exploration pendant les vacances (p.ex. visites de lieux historiques, de merveilles de la nature). Elles étaient également plus susceptibles d'avoir participé à d'autres types de visites culturelles (p.ex. visites de musées, de galeries d'art), en particulier si le thème en était la nature (p.ex. zoos, aquariums et planétariums, foires agricoles et locales, observation de la flore sauvage et des oiseaux). De toute évidence, les personnes qui visitent des jardins botaniques et des espaces jardinés s'intéressent à un vaste éventail d'activités culturelles et de loisirs dans la nature.

Les personnes en voyage qui ont visité une attraction horticole au cours des deux dernières années étaient aussi plus susceptibles d'avoir fait diverses excursions, en particulier des excursions en autocar dans la campagne ou en ville, dans des villages ou le long de la côte à bord de leur propre véhicule. Ce mariage d'activités suggère qu'il serait efficace sur le plan commercial d'inclure des attractions horticoles dans les excursions d'agrément en autocar de plus d'une nuit.

Les personnes en vacances qui ont visité une attraction horticole font des recherches et planifient bien leurs vacances. Il semble que la presse écrite, les bureaux d'information, les agences de voyage et les guides touristiques constituent les meilleurs moyens de toucher les voyageurs s'intéressant aux attractions horticoles.

Travel Activities & Motivation Survey

Horticultural Tourism Report

TAMS
Travel Activities & Motivation Survey

September, 2001

Lang
RESEARCH

Travel Activities & Motivation Survey

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Department of Canadian Heritage

Greater Toronto Hotel Association

Manitoba Ministry of Industry, Trade & Tourism

Northern Ontario Heritage Fund

Ontario Casino Corporation

Ontario Ministry of Agriculture, Food & Rural Affairs

Ontario Tourism, Culture & Recreation

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Interest In Horticultural Tourism Vacation Activities

- Key Findings -

104-00672/

One-quarter of both Canadian and American adults report having visited a garden attraction or botanical garden while on a trip during the last two years. Canadians (14.2%) were slightly more likely than Americans (10.7%) to express interest in future vacation activities of this nature. Among Canadians, those from British Columbia and Quebec were the most likely to have visited a horticultural attraction while on a trip during the past two years. The percentage of visits was lowest in Saskatchewan and Nova Scotia. In the United States, visits to horticultural attractions were above average in the southern regions of the U.S. (e.g., South Atlantic, East South Central, West South Central and Mountain regions) relative to other parts of the U.S.

Visits to horticultural attractions while travelling increase with age, education and income. The key market segment, based on visits to horticultural attractions, are the Affluent Mature and Senior Couples. Other segments which exhibit above average interest in such attractions include Affluent Mature Singles, Mainstream Senior Couples and Mainstream Mature Couples. Altogether, these segments comprise 30.4% of the Canadian market and 29.8% of the U.S. market.

Those who have visited a horticultural attraction while on a trip during the last two years were more likely to have sought out exploratory vacation experiences (e.g., visiting historical sites, natural wonders). They were also more likely to have participated in other types of cultural sightseeing (e.g., visiting museums, art galleries) and especially those with a nature theme (e.g., visiting zoos, aquariums and planetariums, going to agricultural and local fairs, viewing wild flora, and birdwatching). Clearly, those who visit botanical gardens and garden attractions are interested in a broad range of opportunities for cultural and natural sightseeing.

Those who visited a horticultural attraction while on a trip during the past two years were also more likely to have taken various tours, and in particular, scenic bus tours in the country or city, tours of small towns, and coastal drives using their own personal vehicle. This association suggests that including horticultural attractions as part of an overnight scenic bus tour will be effective marketing.

Those who visit horticultural attractions while on vacation research and plan their vacations well. The print media, information bureaus, travel agents and travel guides appear to be the most efficient channels to reach travellers interested in horticultural attractions.

Table of Contents

Key Findings (English)	iii
Conclusions principales (French)	iv
Background	1
Horticultural Tourism Interest Index: Method	2
Interest in Horticultural Tourism: Canada vs. U.S.	3
Interest in Horticultural Tourism: Canada By Province	4
Interest in Horticultural Tourism: U.S. By Region	5
Interest in Horticultural Tourism: By Demographics	6
Interest in Horticultural Tourism: By Market Segment	8
Interest in Horticultural Tourism: Travel in Canada	10
Intentions to Travel to Canada in Next Two Years	13
General Vacation Experiences Sought	14
Outdoor Activities Sought During Pleasure Travel	15
Cultural and Entertainment Activities Sought	16
Accommodation-Related Activities Sought	17
Day and Overnight Touring Activities Sought	18
Sources of Information Consulted to Plan Vacations	19
Interest in New Tourism Products	21
Media Index for Print Media	23
Media Index for Television Programs	24
Percent Using Internet to Research or Book Trips	25
Destination Image Mapping	26
Overall Market Potential Index By Segment	29
Technical Appendices	

Background

An association of Canadian tourism ministries and organizations have collaborated to conduct two large scale surveys to assess the travel activities and motivators of pleasure travel among Canadians and Americans.

This survey, known as the *Travel Activities and Motivation Survey* (TAMS), represents the comprehensive assessment of travel behavior and motivators, and provides a rich and authoritative database to develop marketing strategies and travel products to attract visitors to Canada and Ontario.

A series of analyses are being conducted using the TAMS database to explore the travel patterns of the marketplace as well as the factors which motivate travel behavior. The TAMS database consisted of a telephone survey and a self-completed mailback survey. The survey was conducted in Canada and the United States between September 27, 1999 and April 16, 2000. The telephone survey was completed by 28,397 individuals in the United States and by 18,385 individuals in Canada. Respondents were selected randomly within the household. People participating in the telephone survey who had travelled in the past two years or expressed interest in travel in the next two years were asked to complete a mailback questionnaire. Overall, 40,271 qualified for the mailback questionnaire. Of these, 11,892 (29.4 %) returned usable questionnaires. The response rate was higher in Canada with 5,490 (35.2 %) returning the questionnaire, while 6,405 (26.0 %) of the U.S. respondents returned the questionnaire.

This current study examines interest in botanical gardens and horticultural attractions such as Cypress Gardens or Tivoli Park. The database was used to identify sectors of the market that either visited a botanical garden attraction while travelling during the last two years, or expressed an interest in such an attraction. This report provides the demographic profile, Canadian travel activities, Canadian travel intentions, vacation experiences sought during the past two years, vacation activities participated in during the past two years, media consumption habits, information sources consulted to plan brief and longer vacations, and impressions of Canada and Ontario relative to the interest shown in horticultural attractions. This report also provides an Overall Market Potential of each segment of the market. This identifies the segments that offer the best potential for marketing, advertising and promotional activities designed to promote Canada's/Ontario's horticultural tourism attractions.

Horticultural Tourism Interest Index

Construction of the Index

The TAMS Mailback Survey contained three items specifically associated with horticultural tourism, which were used to construct an overall Horticultural Tourism Interest Index. These were:

- Having pursued the following vacation experience during the past two years:
  - Visiting a garden attraction such as Cypress Gardens or Tivoli Park
  - Visiting a botanical garden
- Indicating that the following new attraction would make them "a lot more interested" in taking a trip to Ontario:
  - A garden attraction such as Cypress Gardens or Tivoli Park.

The responses to these three items were factor analysed to construct the overall Horticultural Tourism Interest Index. Factor scores were computed and respondents were classified into three groups:

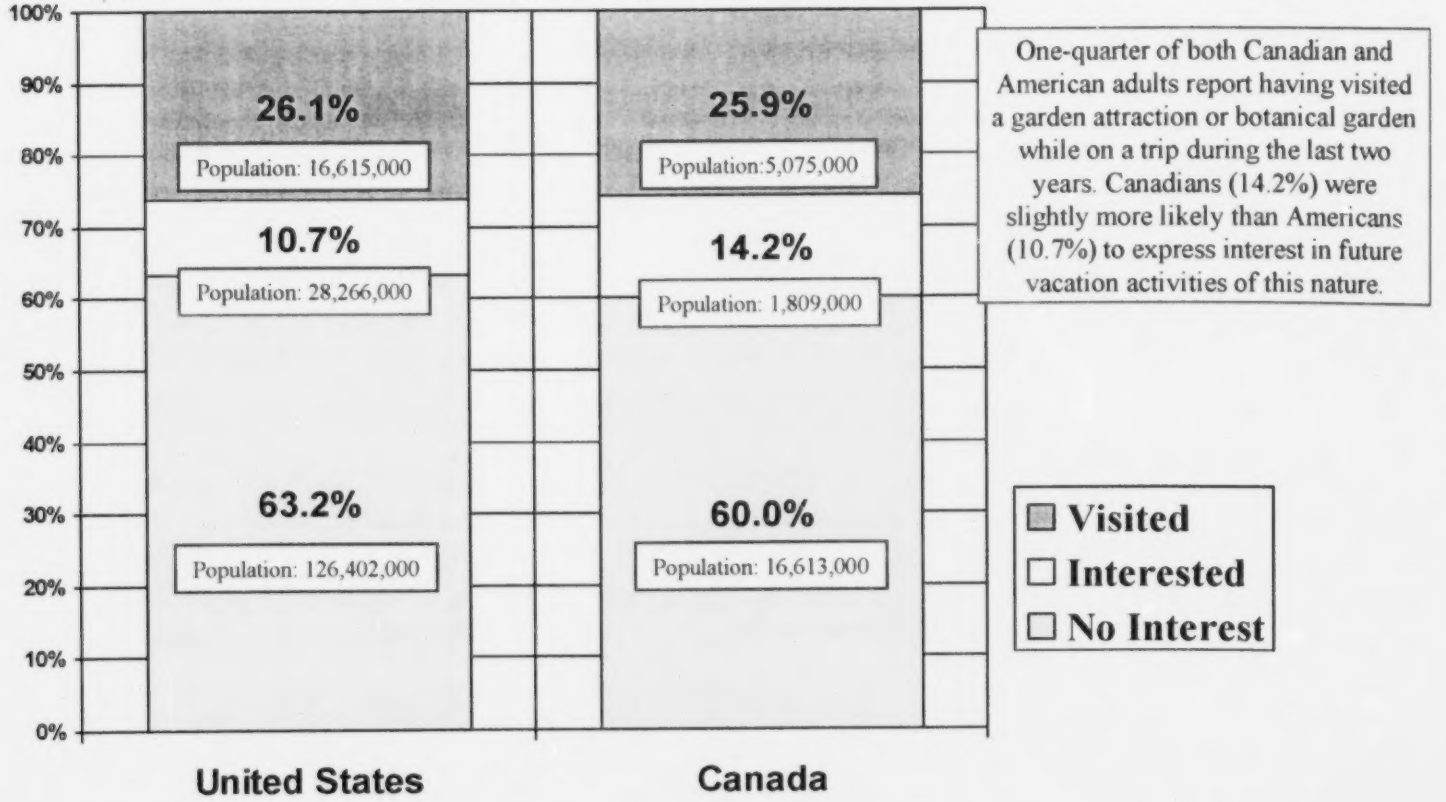
- **No Interest** (Did not visit a botanical garden or garden attraction, and does not express interest in a garden attraction)
- **Interested** (Expressed interest in the new garden attraction, but did not visit a garden attraction while travelling during the last two years)
- **Visited** (Visited either a botanical garden or a garden attraction, e.g., Cypress Gardens or Tivoli Park, while on a trip during the past two years).

Interest in Horticultural Tourism

Canada versus United States

Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years

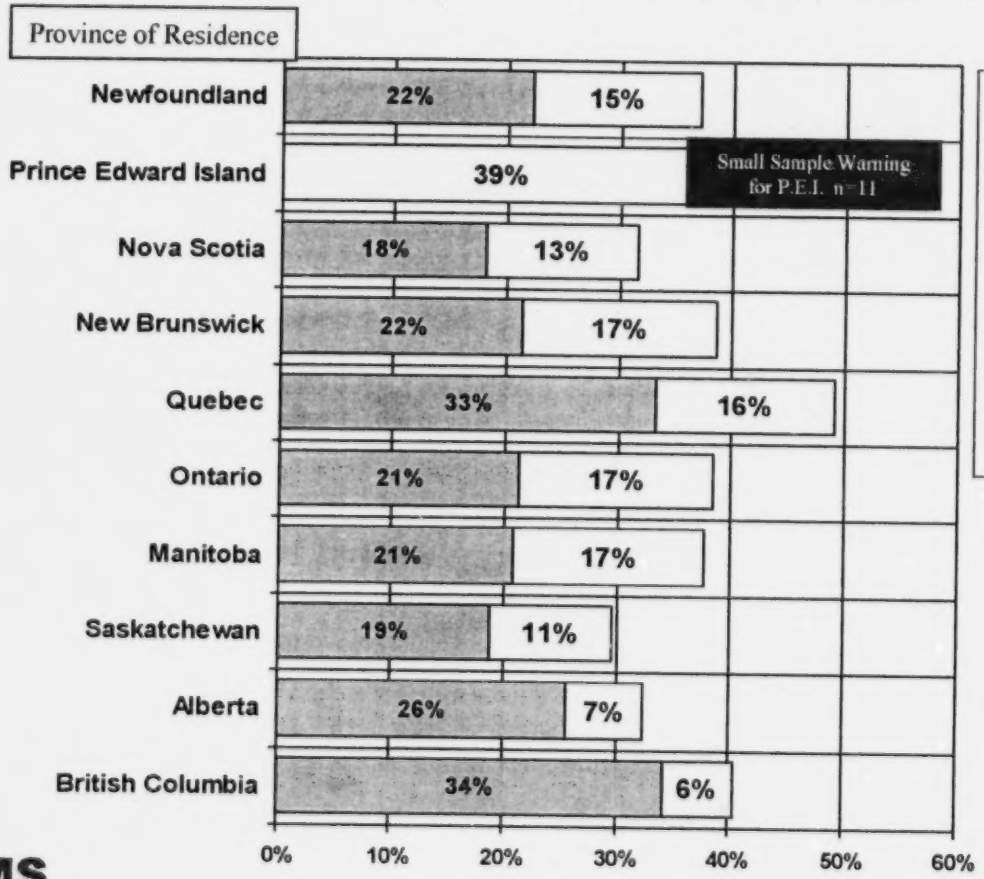


One-quarter of both Canadian and American adults report having visited a garden attraction or botanical garden while on a trip during the last two years. Canadians (14.2%) were slightly more likely than Americans (10.7%) to express interest in future vacation activities of this nature.

Interest in Horticultural Tourism: Based on Prior Travel Activities & Future Interest

Canada: By Province

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



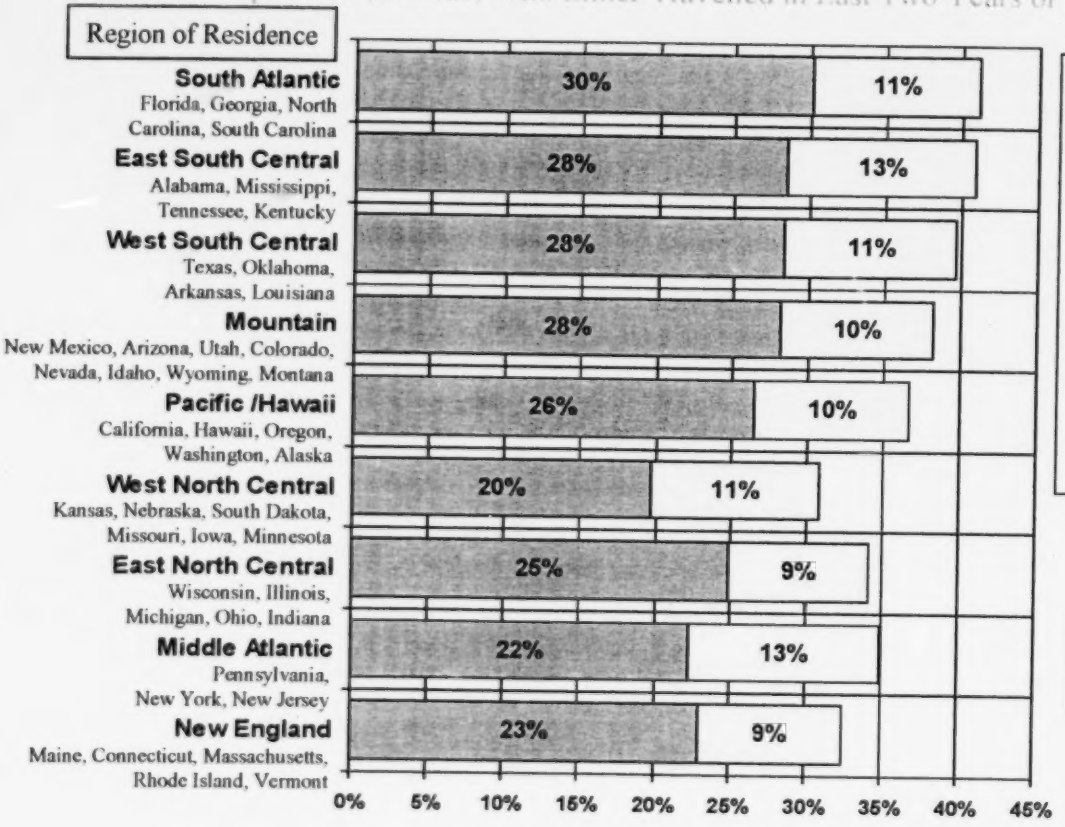
Among Canadians, those from British Columbia and Quebec were the most likely to have visited a horticultural attraction while on a trip during the past two years. The percentage of visits was lowest in Saskatchewan and Nova Scotia. When considering those who express an interest in horticultural attractions, Newfoundland, New Brunswick, Ontario and Manitoba appear to have the potential to approach the participation levels found in British Columbia and Quebec.

Visited
Interested

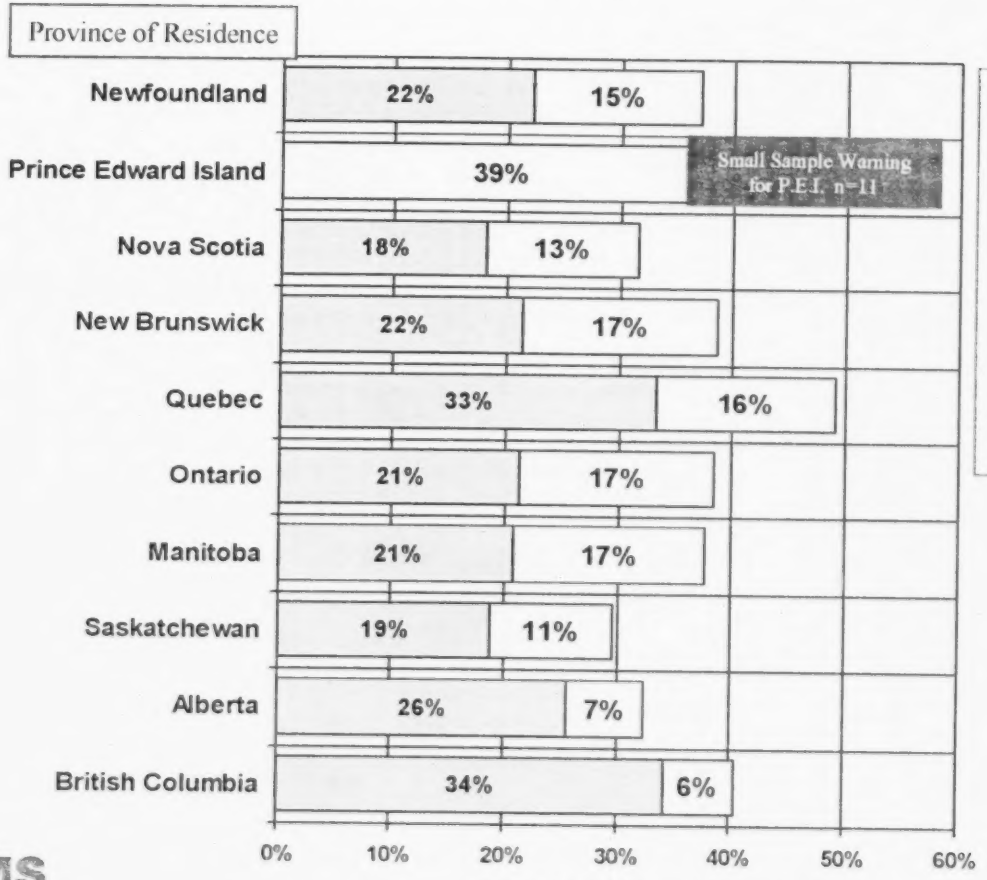
Interest in Horticultural Tourism: Based on Prior Travel Activities & Future Interest

United States: By Region

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



In the United States, visits to horticultural attractions was above average in the southern regions of the U.S. (e.g., South Atlantic, East South Central, West South Central and Mountain regions). These markets offer greater potential for the promotion of horticultural tourism. Those from the West North Central, Middle Atlantic and New England regions were the least likely to have visited a horticultural attraction while travelling during the last two years.



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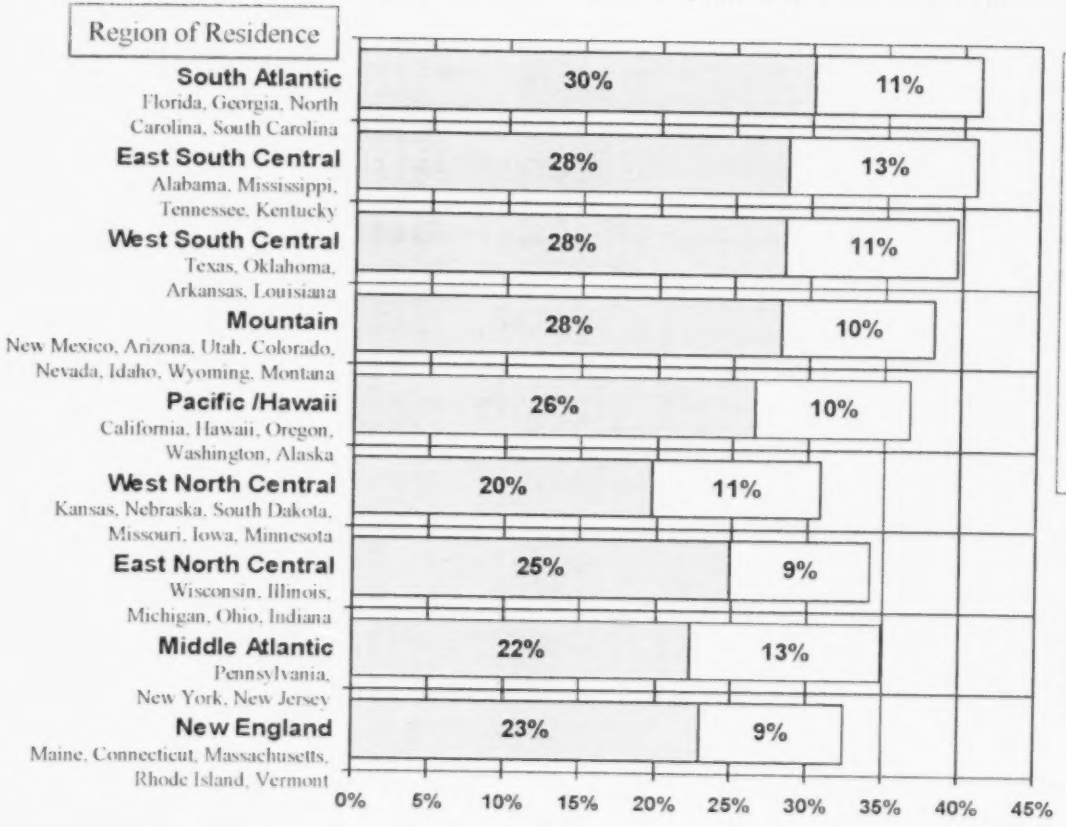
☐ Visited
☐ Interested



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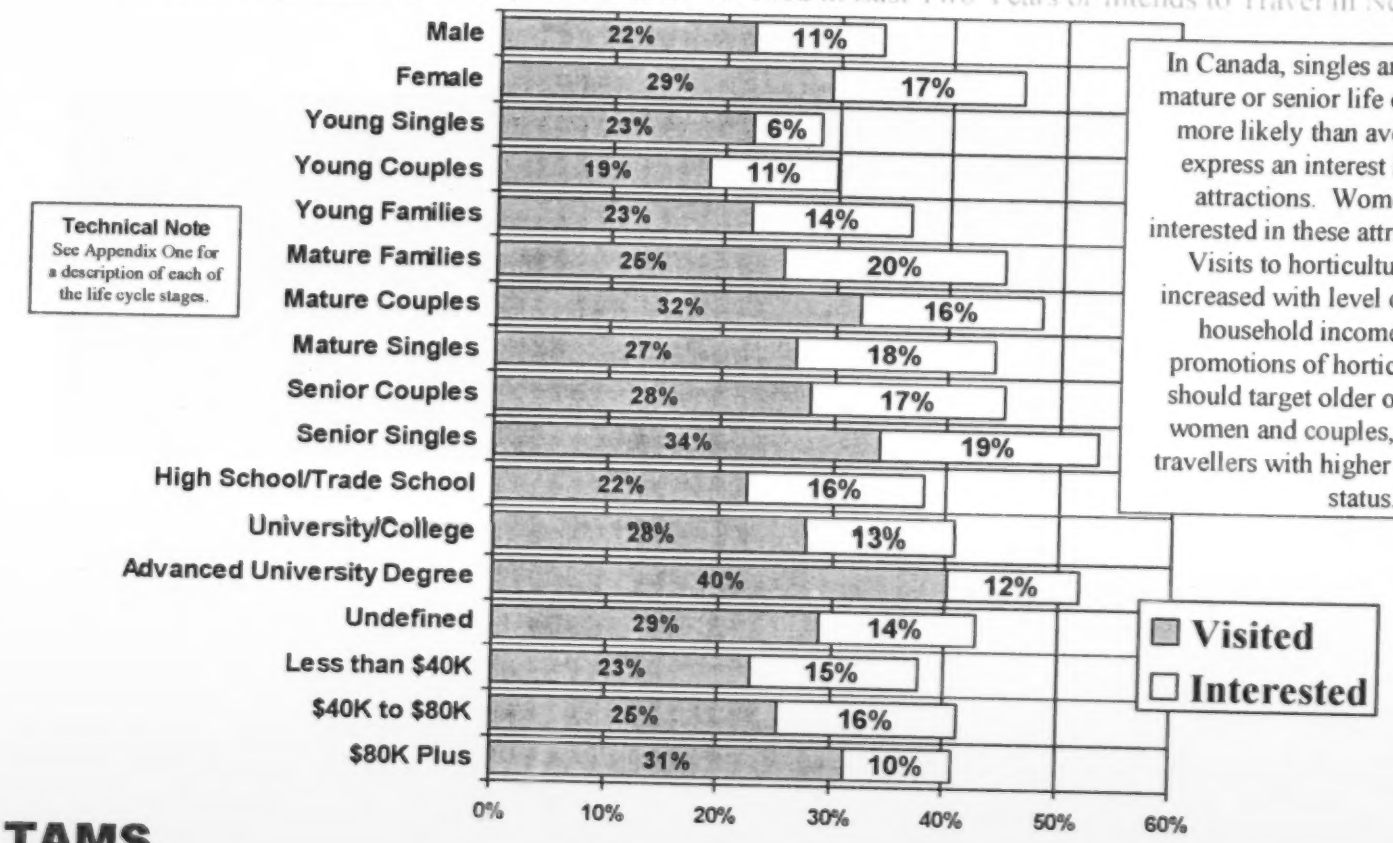
Interest in Horticultural Tourism

Canada: By Demographics

Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



Technical Note
See Appendix One for a description of each of the life cycle stages.

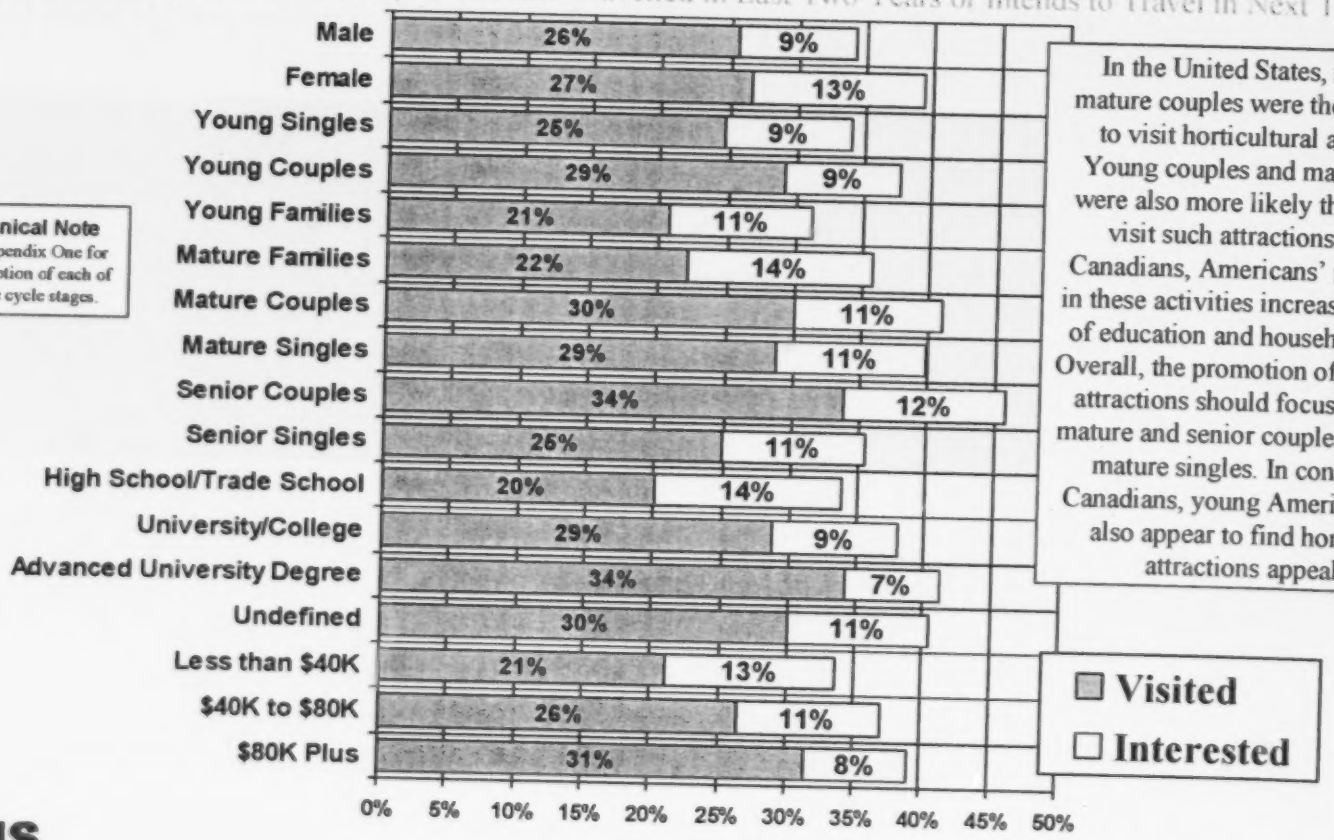
In Canada, singles and couples in the mature or senior life cycle stages were more likely than average to visit or express an interest in horticultural attractions. Women were more interested in these attractions than men. Visits to horticultural attractions increased with level of education and household income. In general, promotions of horticultural tourism should target older or mature single women and couples, and especially travellers with higher socio-economic status.

Interest in Horticultural Tourism

United States: By Demographics

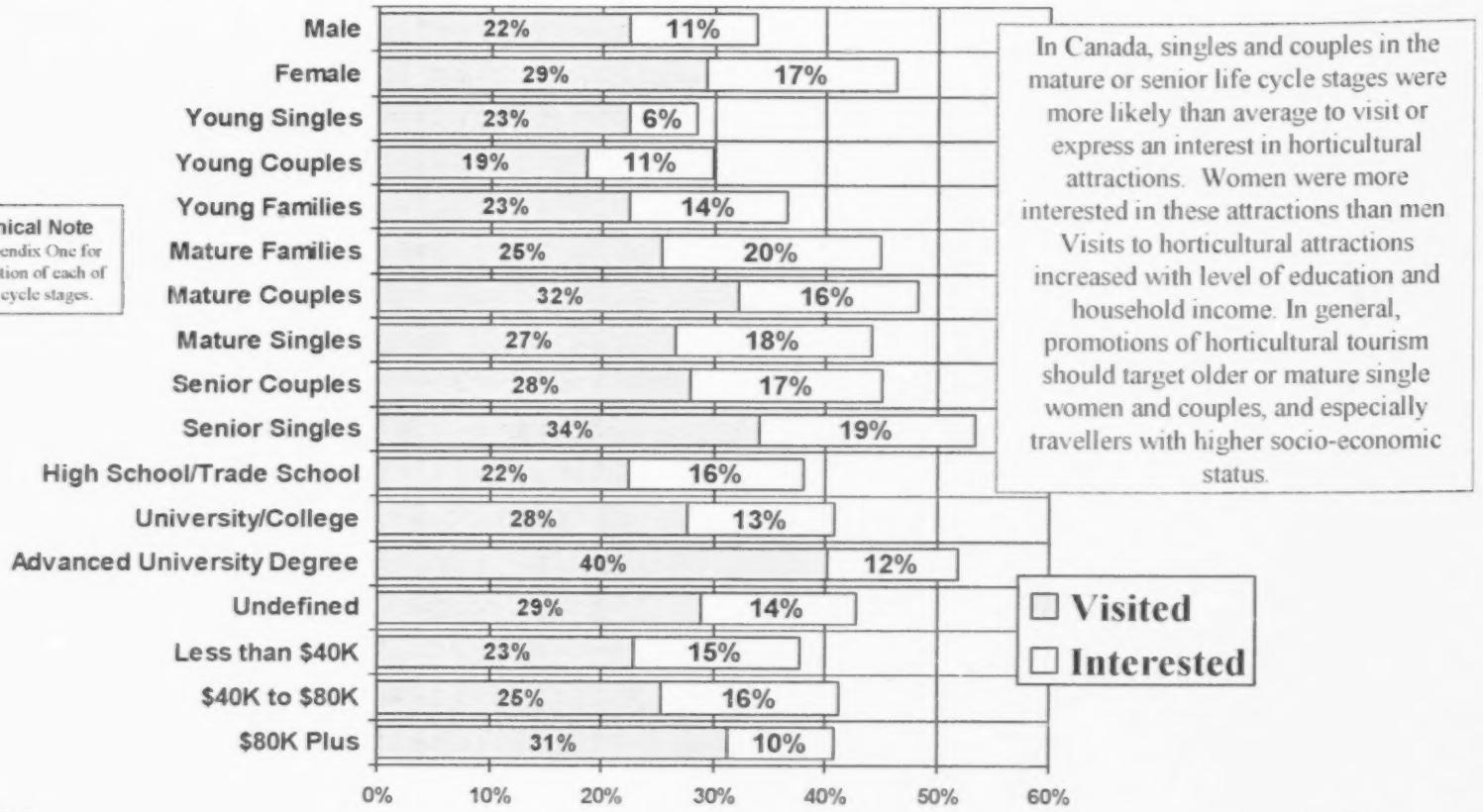
Based on Prior Travel Activities and Future Interest

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years


Male 26% 9%
Female 27% 13%
Young Singles 25% 9%
Young Couples 29% 9%
Young Families 21% 11%
Mature Families 22% 14%
Mature Couples 30% 11%
Mature Singles 29% 11%
Senior Couples 34% 12%
Senior Singles 26% 11%
High School/Trade School 20% 14%
University/College 29% 9%
Advanced University Degree 34% 7%
Undefined 30% 11%
Less than $40K 21% 13%
$40K to $80K 26% 11%
$80K Plus 31% 8%
0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%
Visited
Interested

Technical Note
See Appendix One for a description of each of the life cycle stages.

In the United States, senior and mature couples were the most likely to visit horticultural attractions. Young couples and mature singles were also more likely than others to visit such attractions. As with Canadians, Americans' involvement in these activities increases with level of education and household income. Overall, the promotion of horticultural attractions should focus on upscale mature and senior couples, along with mature singles. In contrast with Canadians, young American couples also appear to find horticultural attractions appealing.



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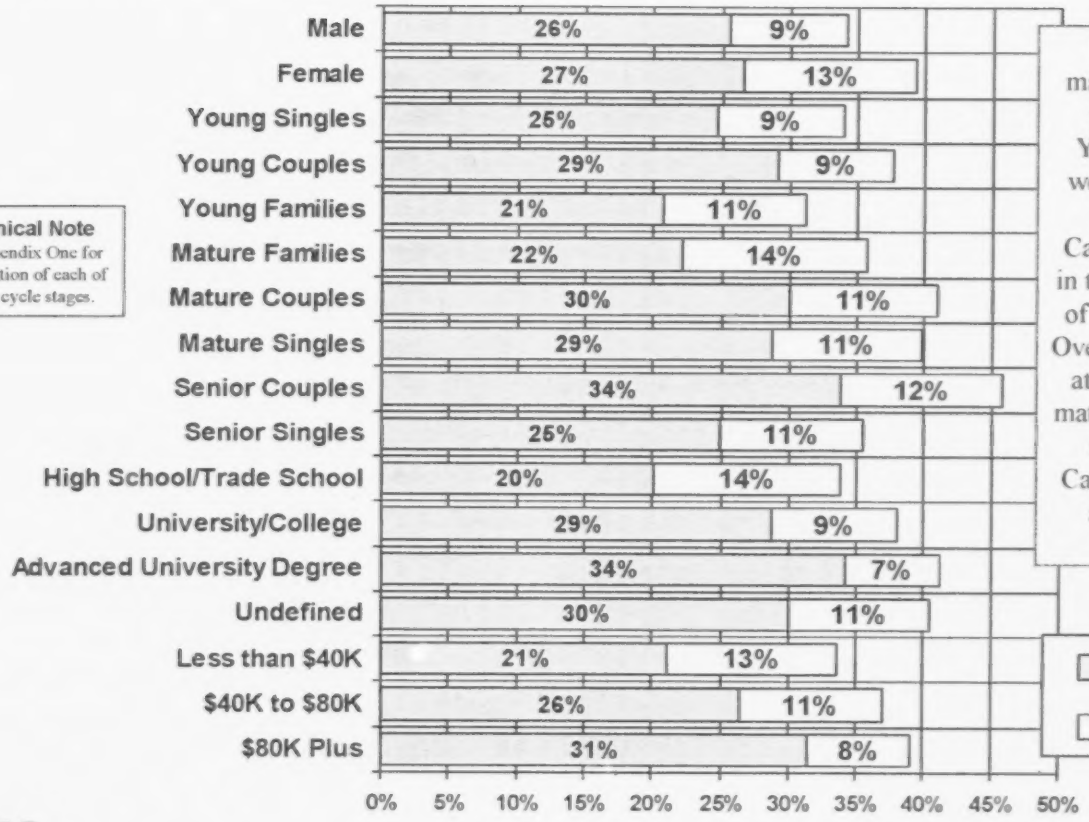
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Interested

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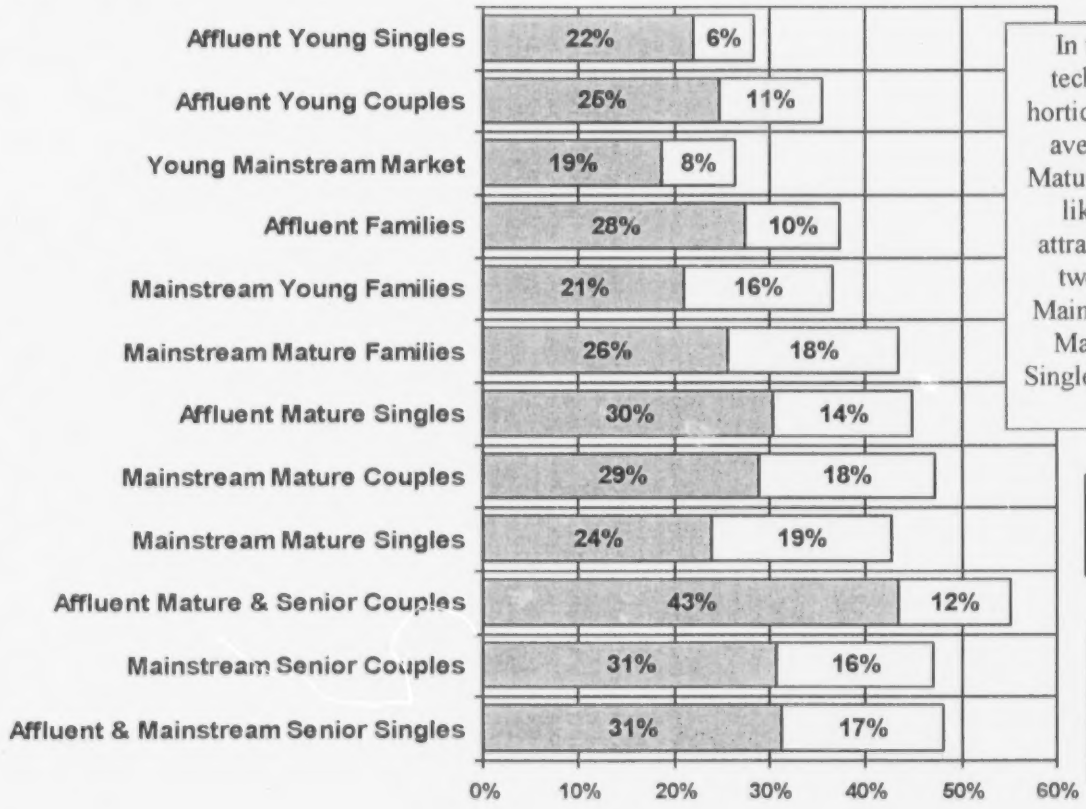
Interest in Horticultural Tourism
Canada: By Market Segment
Based on Prior Travel Activities and Future Interest
Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



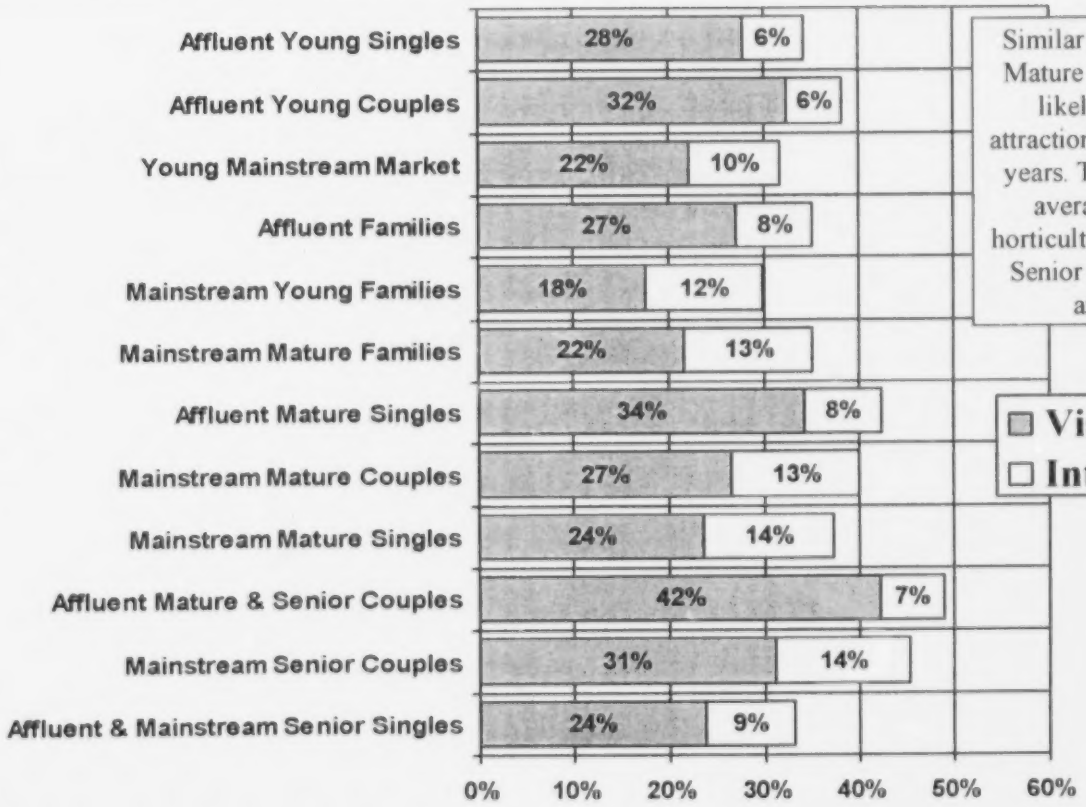
In terms of the market segments (see technical notes) in Canada, interest in horticultural attractions increases with the average age of the segments. Affluent Mature and Senior Couples were the most likely to have visited a horticultural attraction while on a trip during the past two years. However, Senior Singles, Mainstream Senior Couples, Mainstream Mature Couples and Affluent Mature Singles also exhibit above average interest in horticultural attractions.

☐ Visited
☐ Interested

Technical Note

The market segments used in this analysis have been derived using the Ontario Tourism Marketing Partnership (OTMP) tracking database. See Appendix Two for a description of each of these segments.

Interest in Horticultural Tourism
United States: By Market Segment
Based on Prior Travel Activities and Future Interest
Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



Similar to Canada, the American Affluent Mature and Single Couples were the most likely to have visited a horticultural attraction while on a trip during the past two years. The other segments showing above average rates of visits and interest in horticultural attractions include Mainstream Senior Couples, Affluent Mature Singles and Affluent Young Couples.

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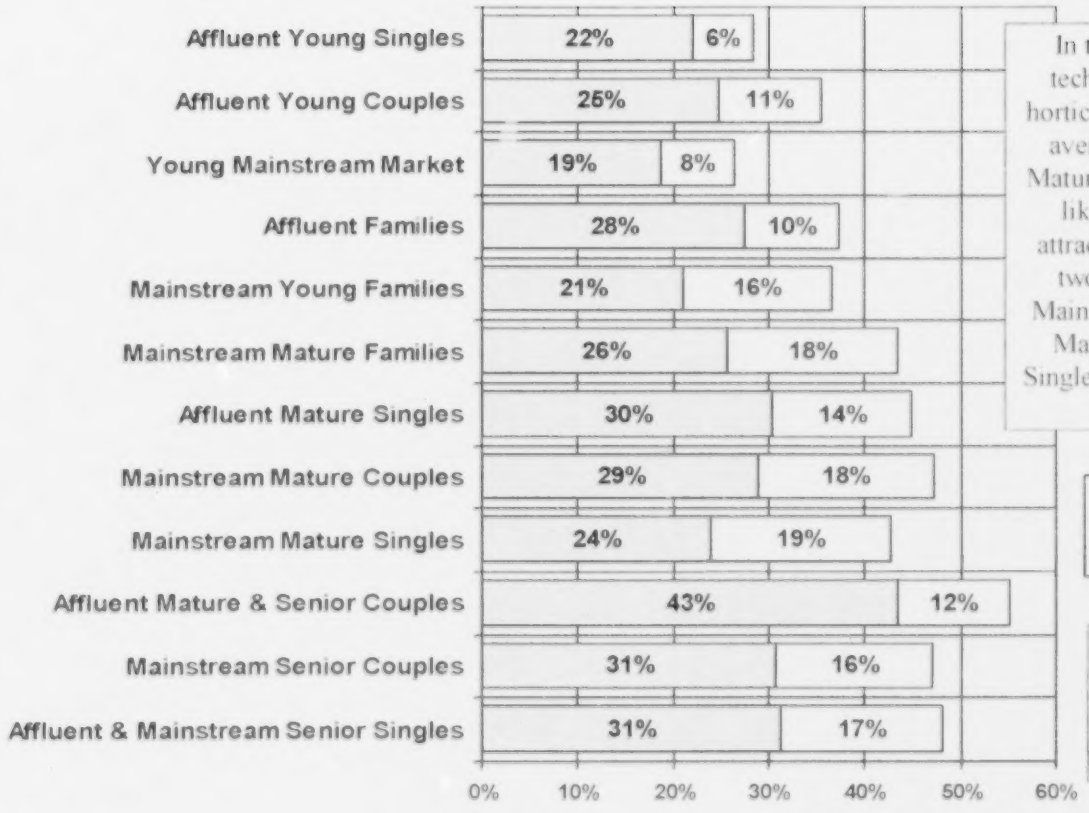

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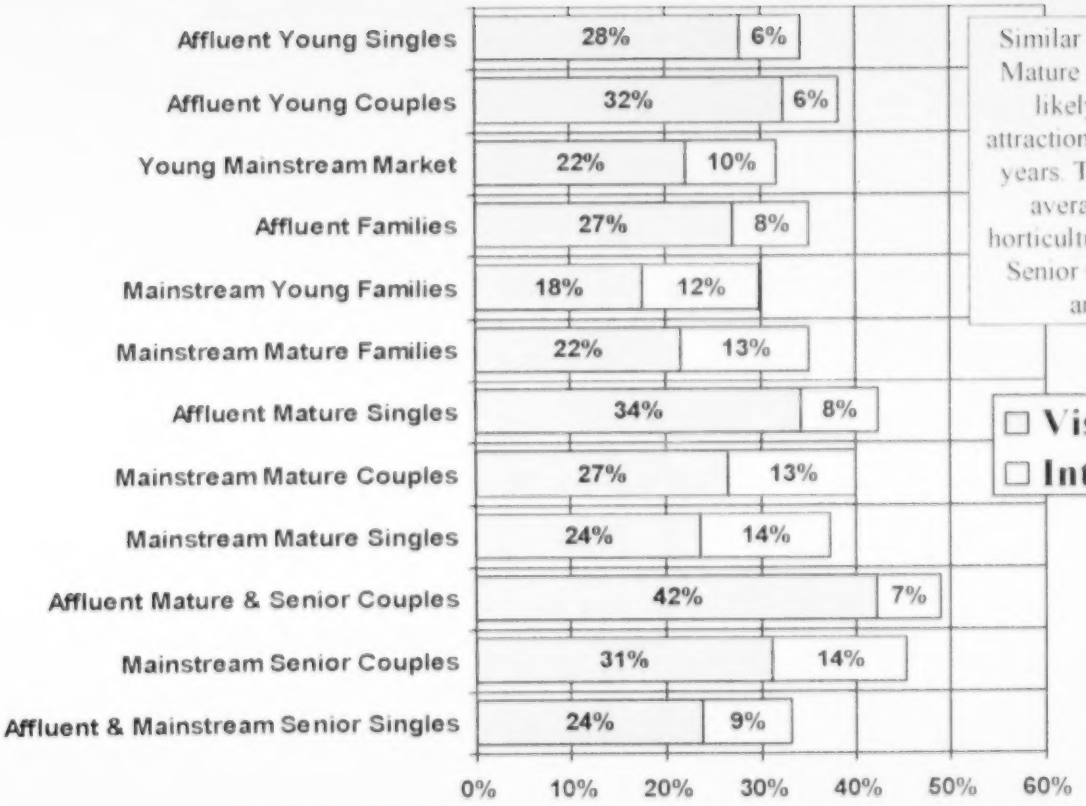

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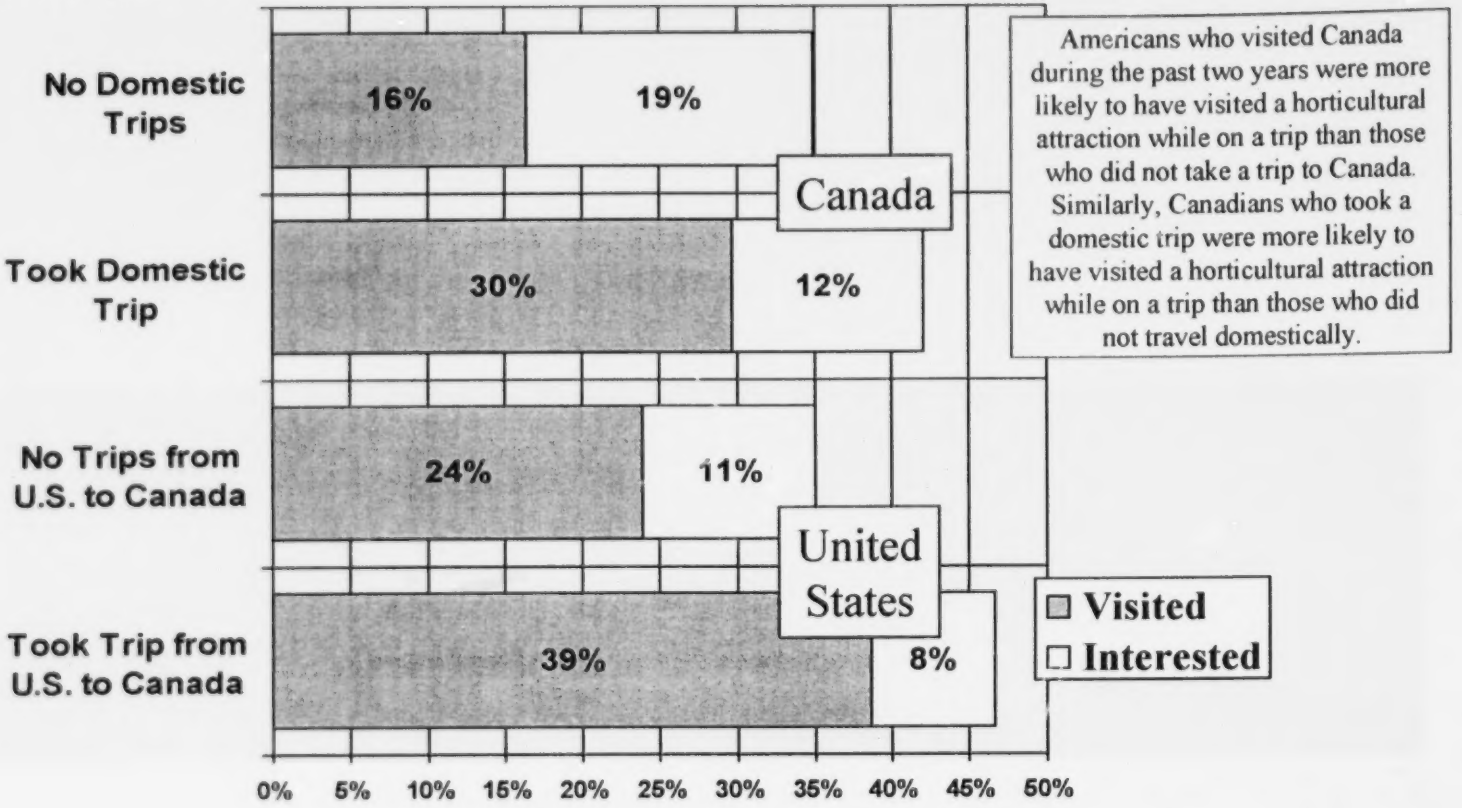
Interest in Horticultural Tourism

Canada vs. U.S.: By Trips In Canada Last Two Years

Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



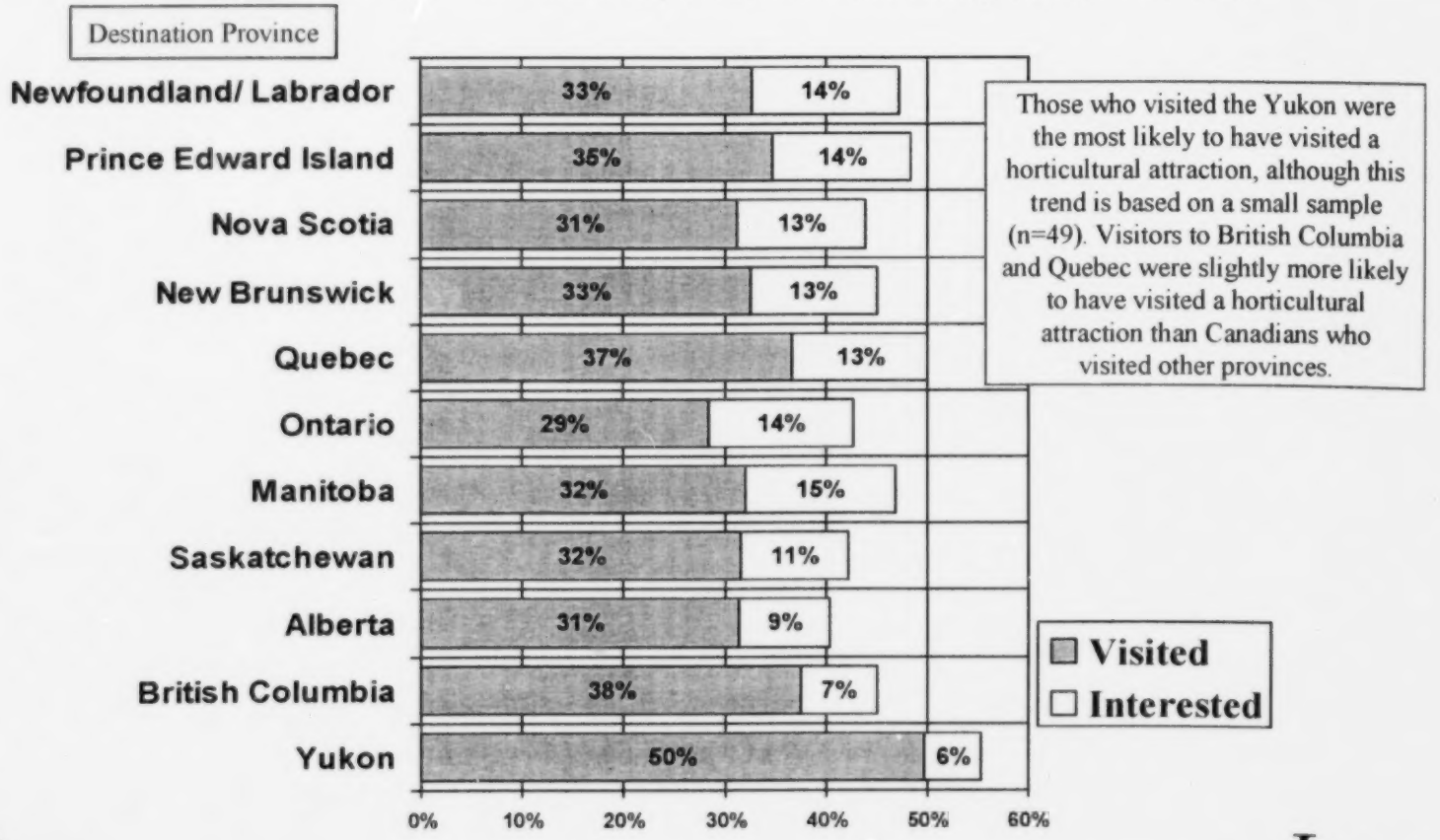
Americans who visited Canada during the past two years were more likely to have visited a horticultural attraction while on a trip than those who did not take a trip to Canada. Similarly, Canadians who took a domestic trip were more likely to have visited a horticultural attraction while on a trip than those who did not travel domestically.

Interest in Horticultural Tourism

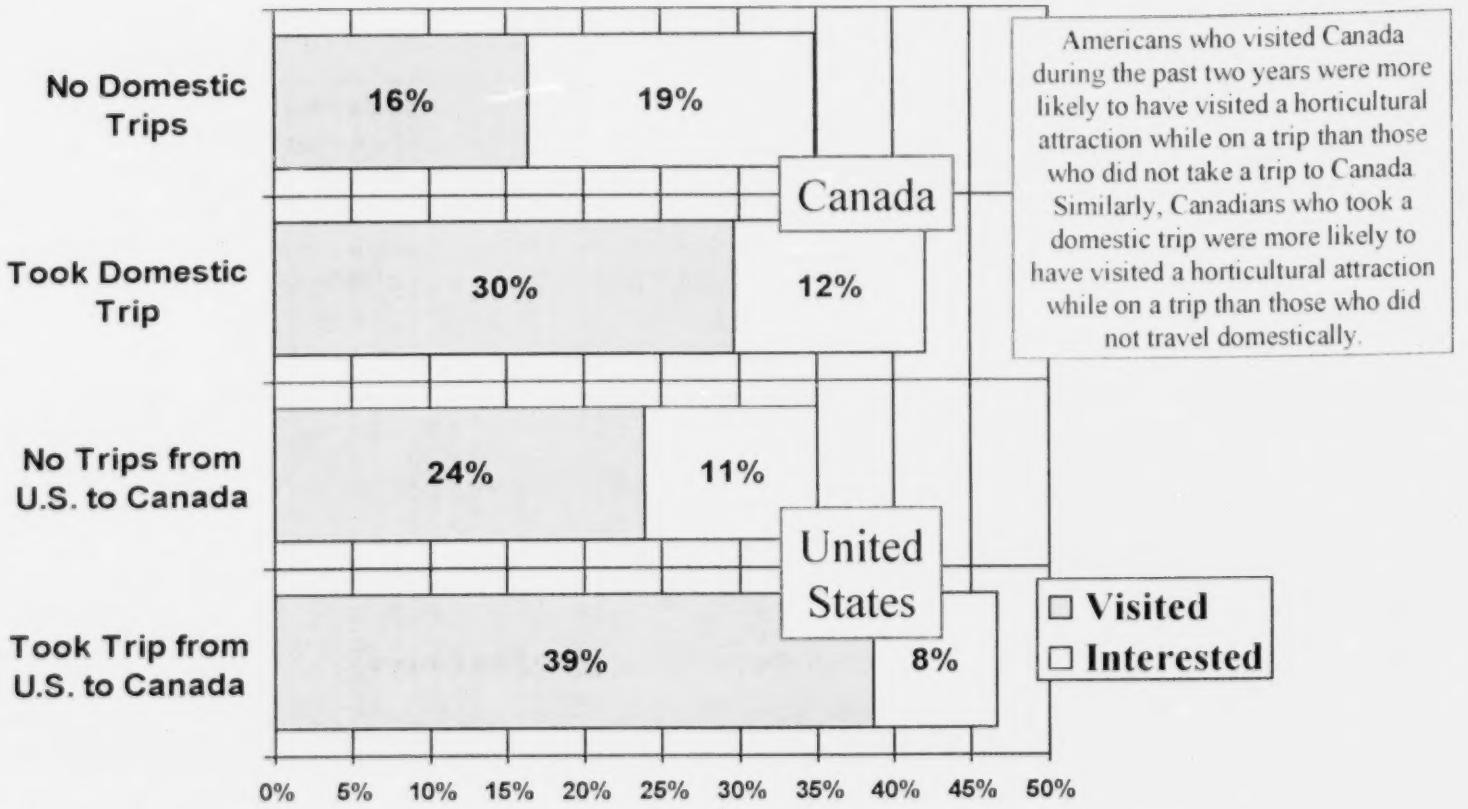
Canada: Interest By Province Travelled To

Base: Percent Taking At Least One Trip In Canada Within the Last Two Years

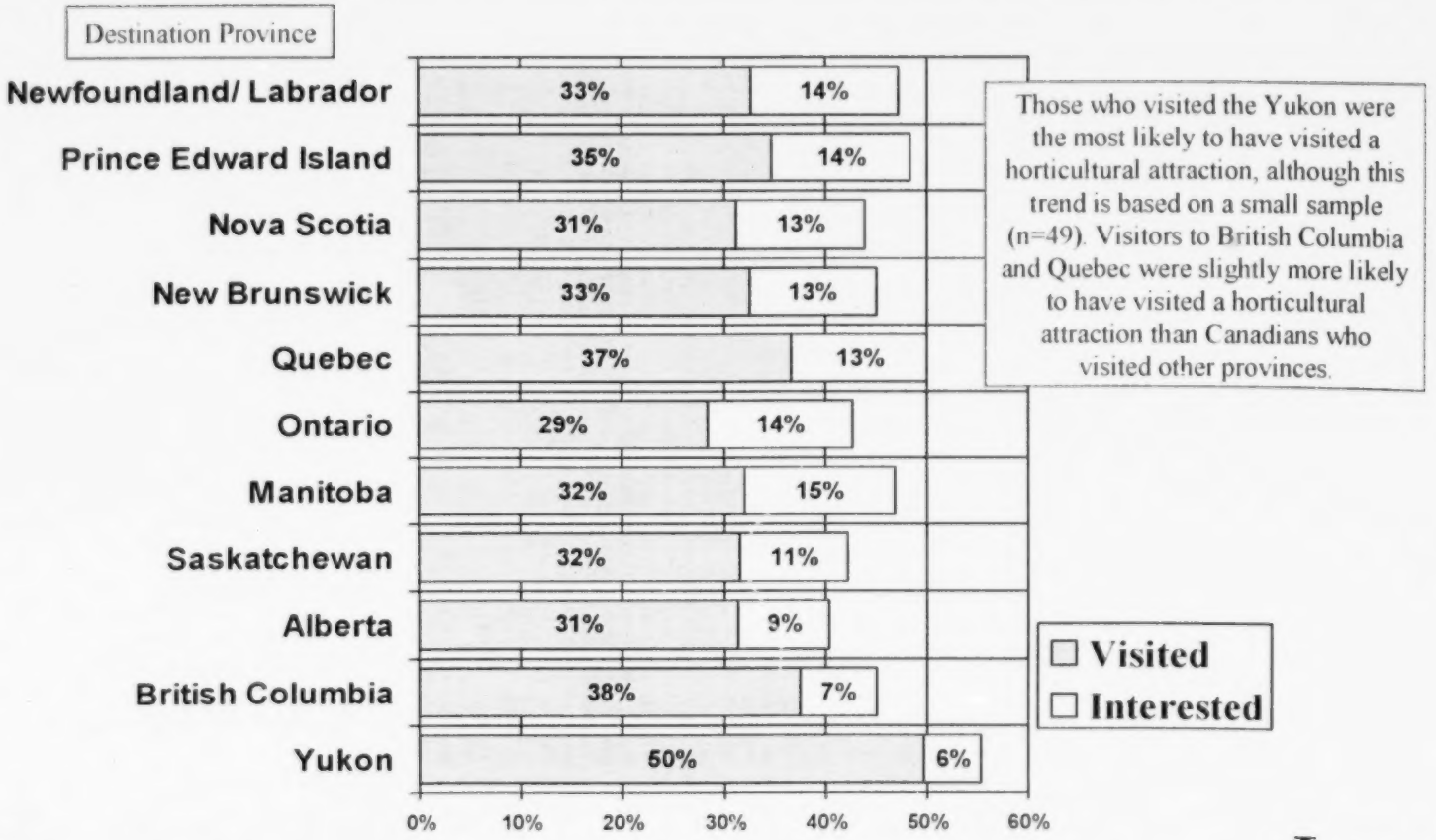
Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years



Those who visited the Yukon were the most likely to have visited a horticultural attraction, although this trend is based on a small sample (n=49). Visitors to British Columbia and Quebec were slightly more likely to have visited a horticultural attraction than Canadians who visited other provinces.



Americans who visited Canada during the past two years were more likely to have visited a horticultural attraction while on a trip than those who did not take a trip to Canada. Similarly, Canadians who took a domestic trip were more likely to have visited a horticultural attraction while on a trip than those who did not travel domestically.

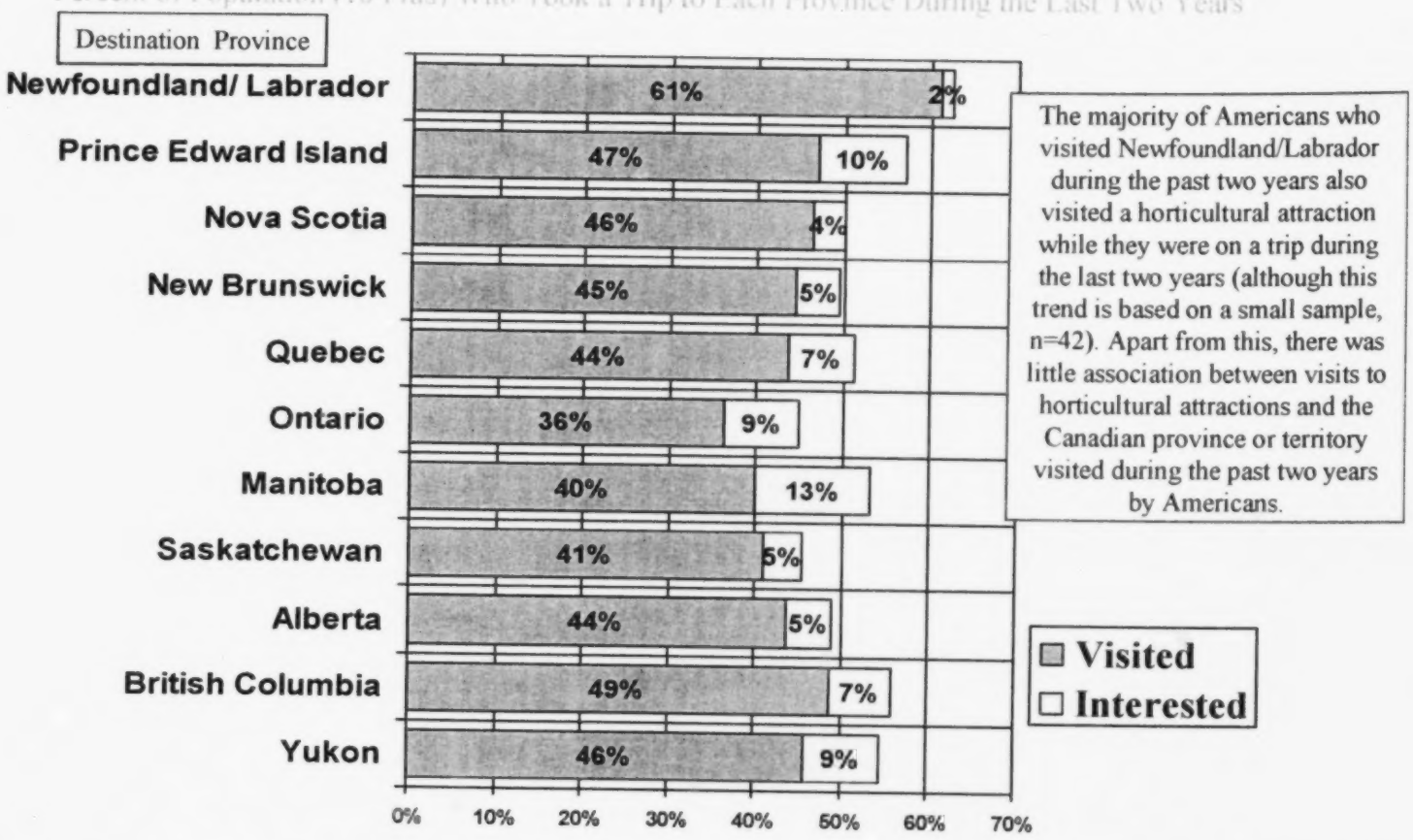

Destination Province
Newfoundland/ Labrador
Prince Edward Island
Nova Scotia
New Brunswick
Quebec
Ontario
Manitoba
Saskatchewan
Alberta
British Columbia
Yukon
33%
14%
35%
14%
31%
13%
33%
13%
37%
13%
29%
14%
32%
15%
32%
11%
31%
9%
38%
7%
50%
6%
0%
10%
20%
30%
40%
50%
60%
Visited
Interested
Those who visited the Yukon were the most likely to have visited a horticultural attraction, although this trend is based on a small sample (n=49). Visitors to British Columbia and Quebec were slightly more likely to have visited a horticultural attraction than Canadians who visited other provinces.

Interest in Horticultural Tourism

United States: Interest By Province Travelled To

Base: Percent Taking At Least One Trip In Canada Within the Last Two Years

Percent of Population (18 Plus) Who Took a Trip to Each Province During the Last Two Years



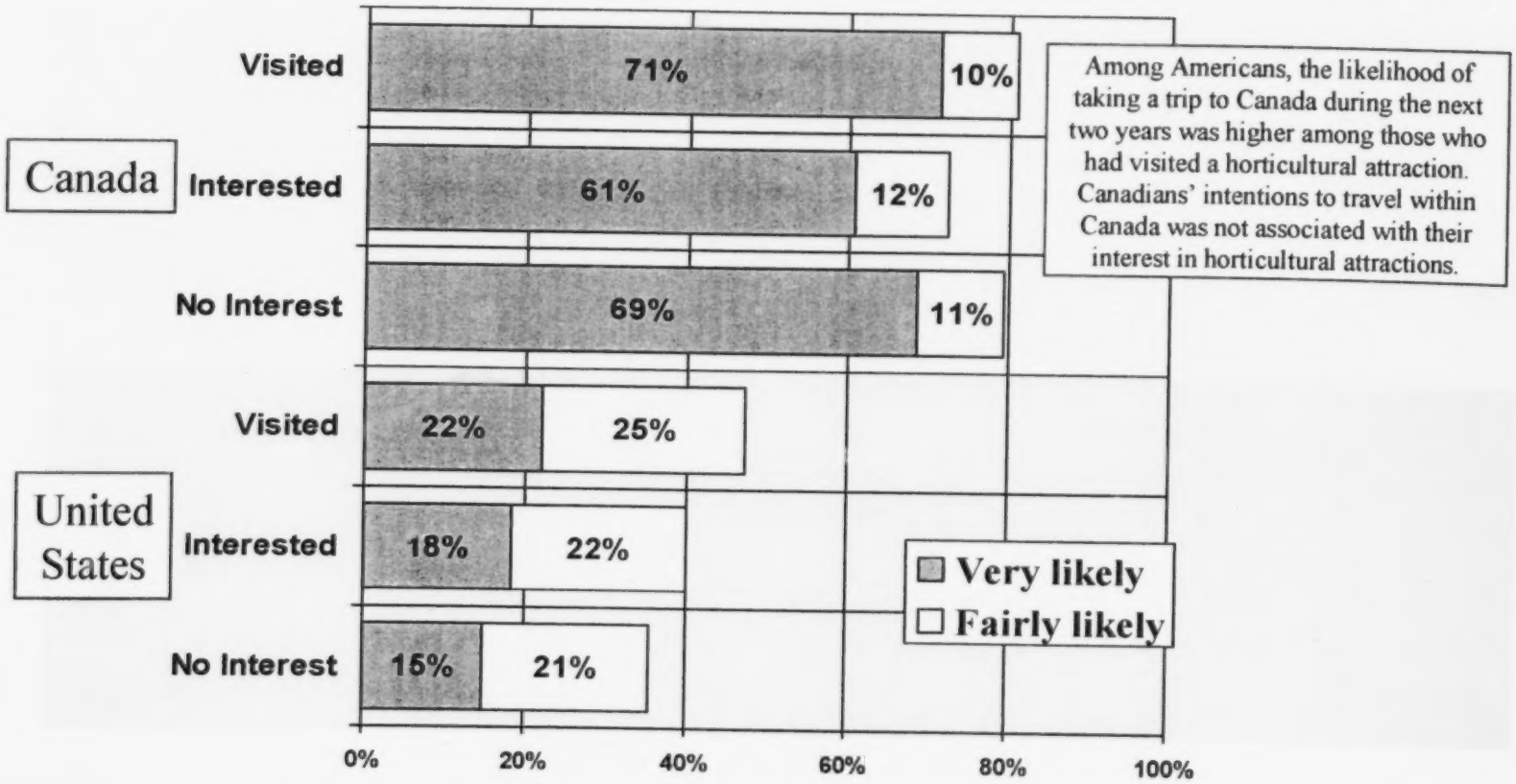
The majority of Americans who visited Newfoundland/Labrador during the past two years also visited a horticultural attraction while they were on a trip during the last two years (although this trend is based on a small sample, n=42). Apart from this, there was little association between visits to horticultural attractions and the Canadian province or territory visited during the past two years by Americans.

Interest in Horticultural Tourism

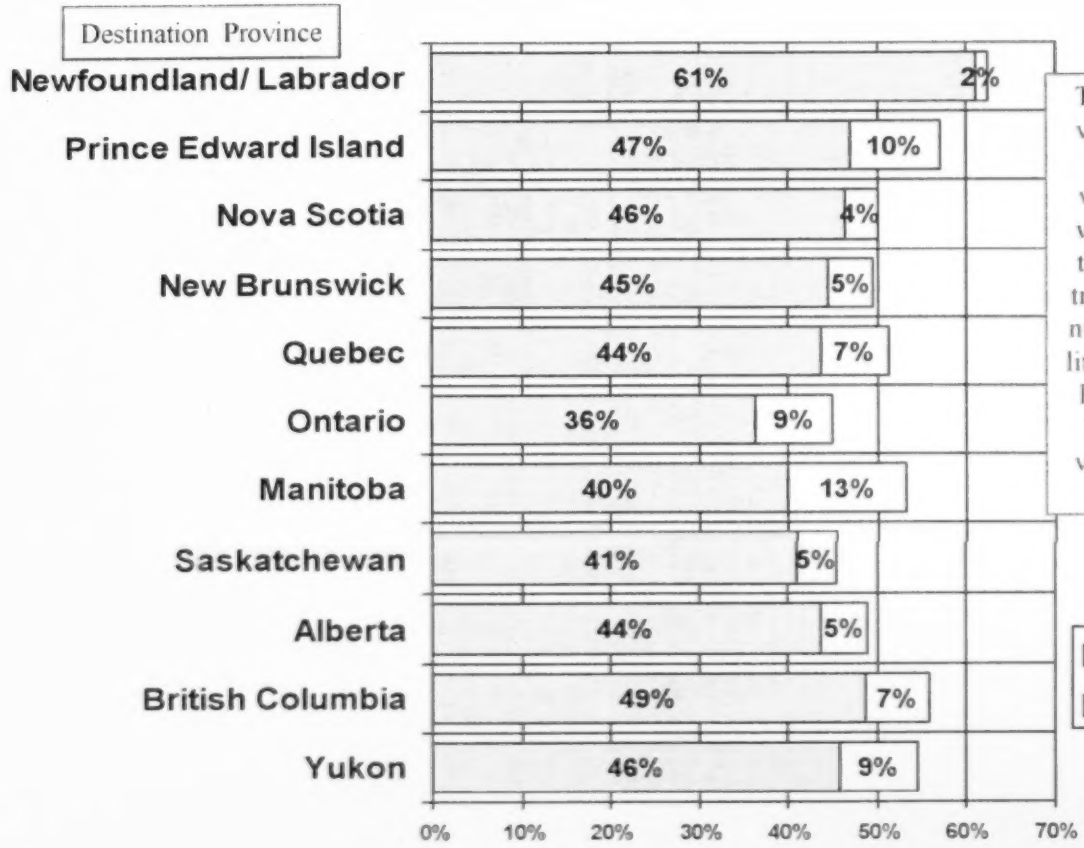
Intentions to Travel to Canada Next Two Years

Interest in Horticultural Tourism By Intentions to Travel In Canada During Next Two Years

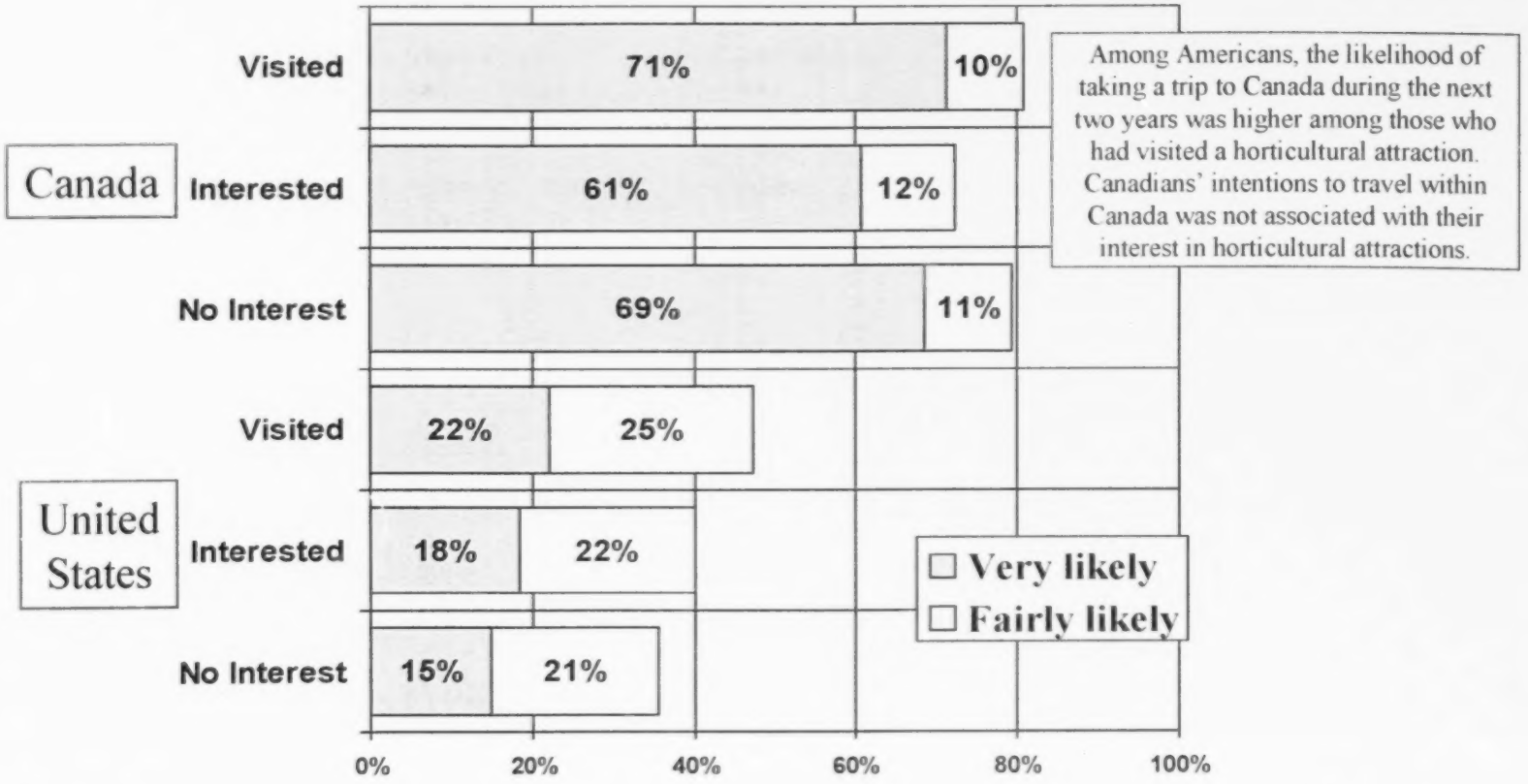
Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



Among Americans, the likelihood of taking a trip to Canada during the next two years was higher among those who had visited a horticultural attraction. Canadians' intentions to travel within Canada was not associated with their interest in horticultural attractions.



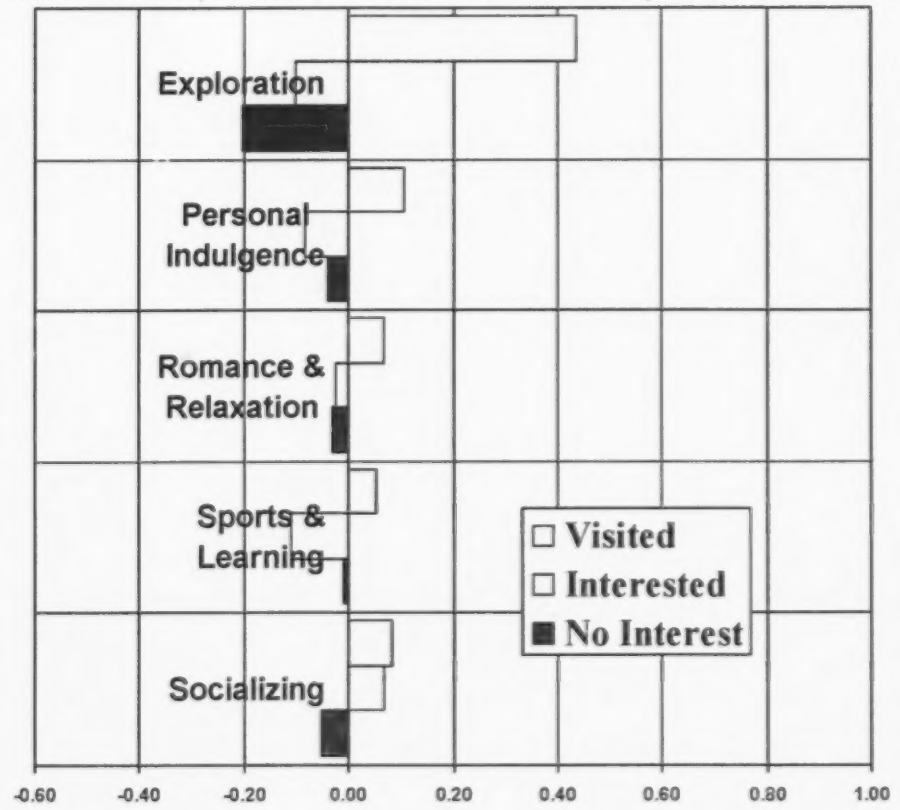
The majority of Americans who visited Newfoundland/Labrador during the past two years also visited a horticultural attraction while they were on a trip during the last two years (although this trend is based on a small sample, n=42). Apart from this, there was little association between visits to horticultural attractions and the Canadian province or territory visited during the past two years by Americans.



Among Americans, the likelihood of taking a trip to Canada during the next two years was higher among those who had visited a horticultural attraction. Canadians' intentions to travel within Canada was not associated with their interest in horticultural attractions.

General Vacation Experiences Sought During Pleasure Travel in the Past Two Years By Interest in Horticultural Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



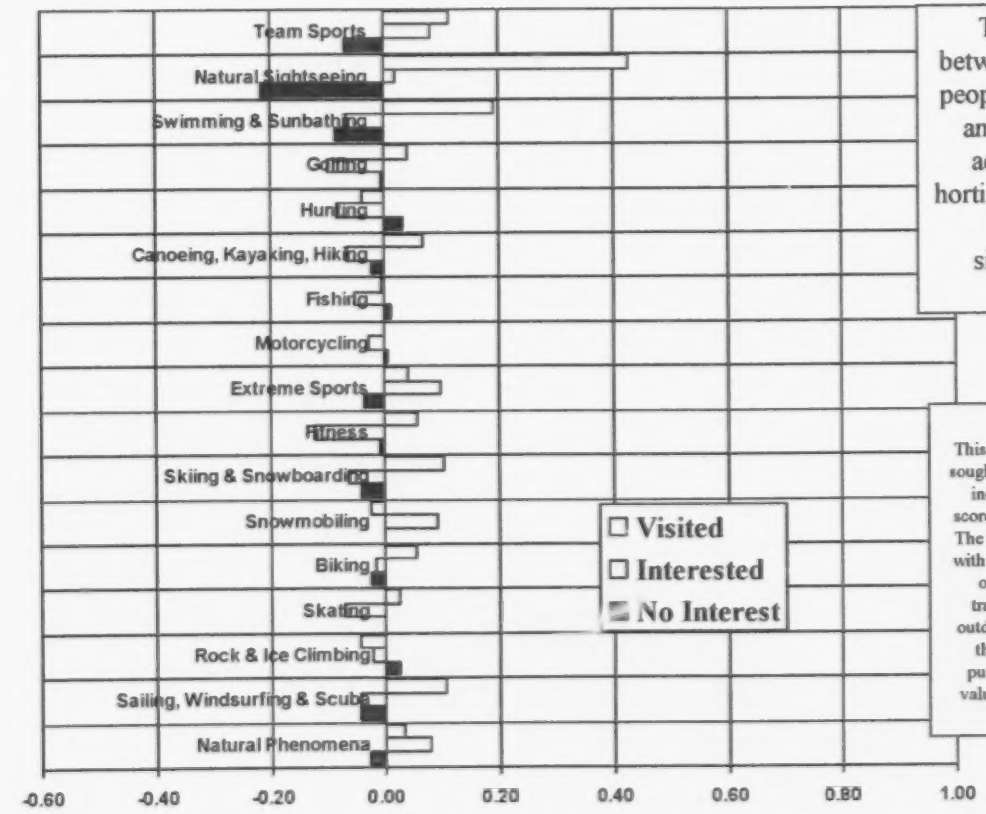
Those who had visited a horticultural attraction while on a trip during the last two years were more likely to have sought out exploratory vacation experiences (e.g., visiting historical sites, natural wonders). Advertising and promotional materials for horticultural tourism products should emphasize the cultural and exploratory activities also available in the region.

Technical Note

This analysis is based on a factor analysis of the vacation experiences sought during the past two years. See Appendix Three for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given vacation experience. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the vacation experience. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the vacation experience.

Outdoor Activities Sought During Pleasure Travel in the Past Two Years By Interest in Horticultural Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



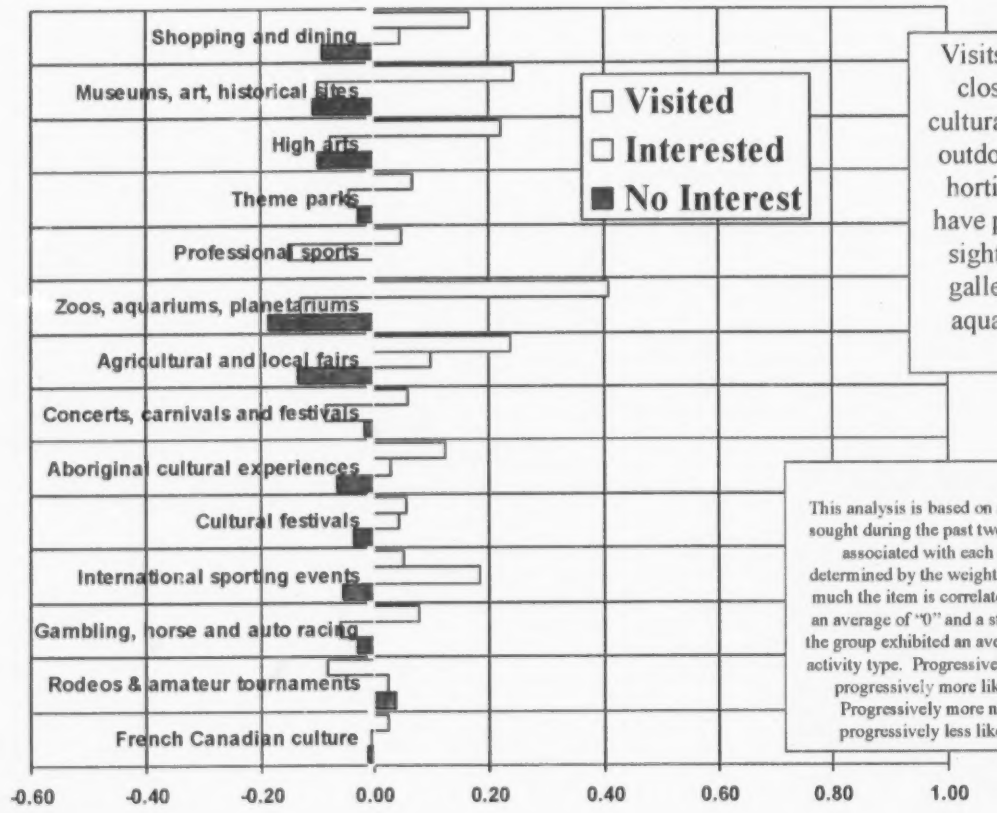
There was a relatively weak association between visits to horticultural attractions while people were on a trip during the last two years, and participation in other outdoor vacation activities. However, those who did visit a horticultural attraction were more likely to have participated in other forms of natural sightseeing, such as wildflower and flora viewing, and birdwatching.

Technical Note

This analysis is based on a factor analysis of the outdoor vacation activities sought during the past two years. See Appendix Four for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given outdoor vacation activity type. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the outdoor vacation activity type. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the outdoor vacation activity type.

Cultural and Entertainment Activities Sought During Pleasure Travel in the Past Two Years By Interest in Horticultural Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



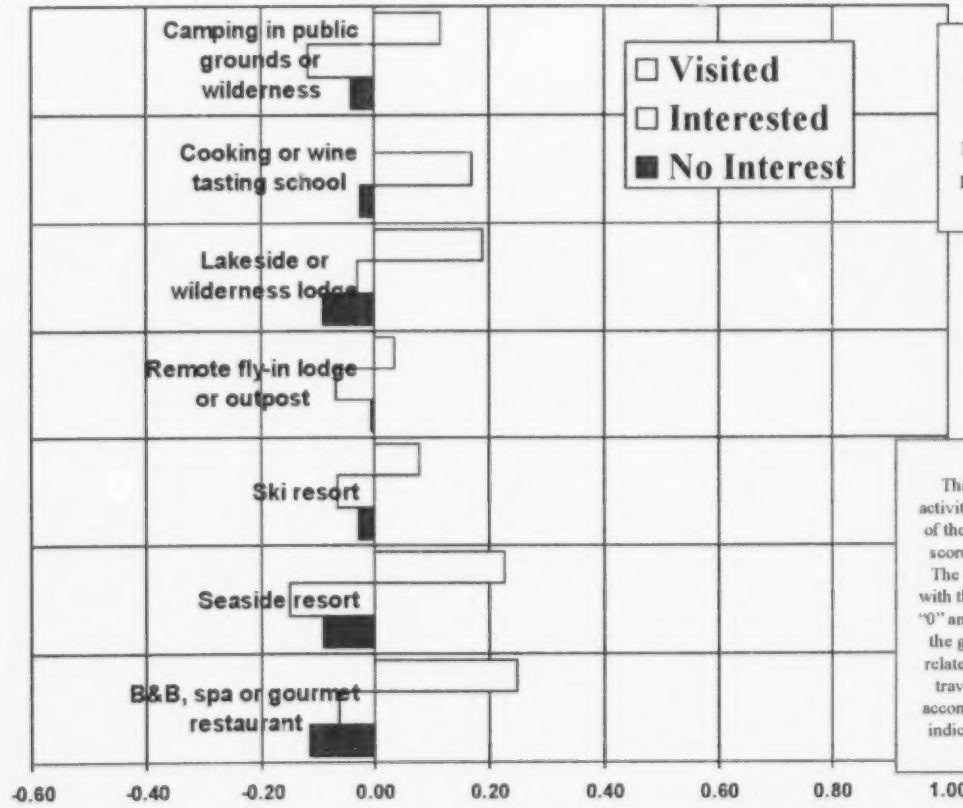
Visits to horticultural attractions were more closely linked with participation in other cultural and entertainment activities than with outdoor activities. Thus, those who visited a horticultural attraction were more likely to have participated in others forms of "cultural sightseeing" such as visiting museums, art galleries and historical sites, visiting zoos, aquariums and planetariums, and going to agricultural and local fairs.

Technical Note

This analysis is based on a factor analysis of the culture and entertainment vacation activities sought during the past two years. See Appendix Five for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given cultural and entertainment vacation activity type. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the cultural and entertainment activity type. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the cultural and entertainment activity type.

Accommodation-Related Activities Sought During Pleasure Travel in the Past Two Years By Interest in Horticultural Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



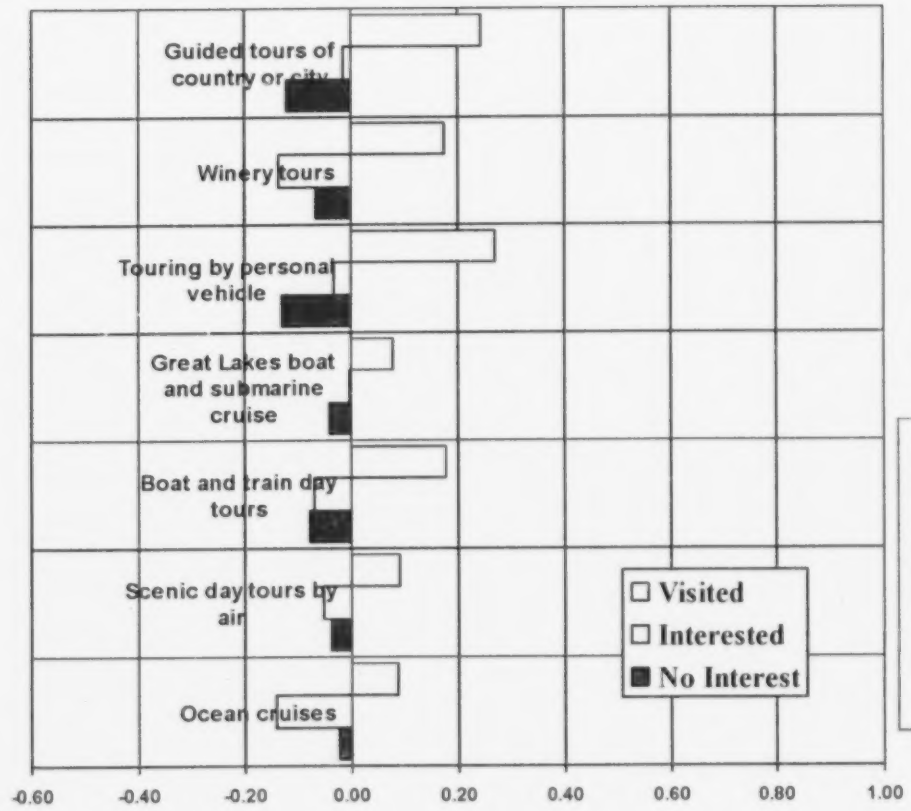
Travellers visiting horticultural attractions while on a trip were more likely than others to have stayed in a B&B, spa or gourmet restaurant (with accommodations), a seaside resort, or a lakeside or wilderness lodge than those who did not visit such attractions.

Technical Note

This analysis is based on a factor analysis of the accommodation-related activities sought during the past two years. See Appendix Six for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to pursue a given accommodation-related vacation activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have pursued the accommodation-related vacation activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have pursued the accommodation-related vacation activity.

Day and Overnight Touring Activities in the Past Two Years By Interest in Horticultural Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years, Canada & U.S. (Mailback Survey)



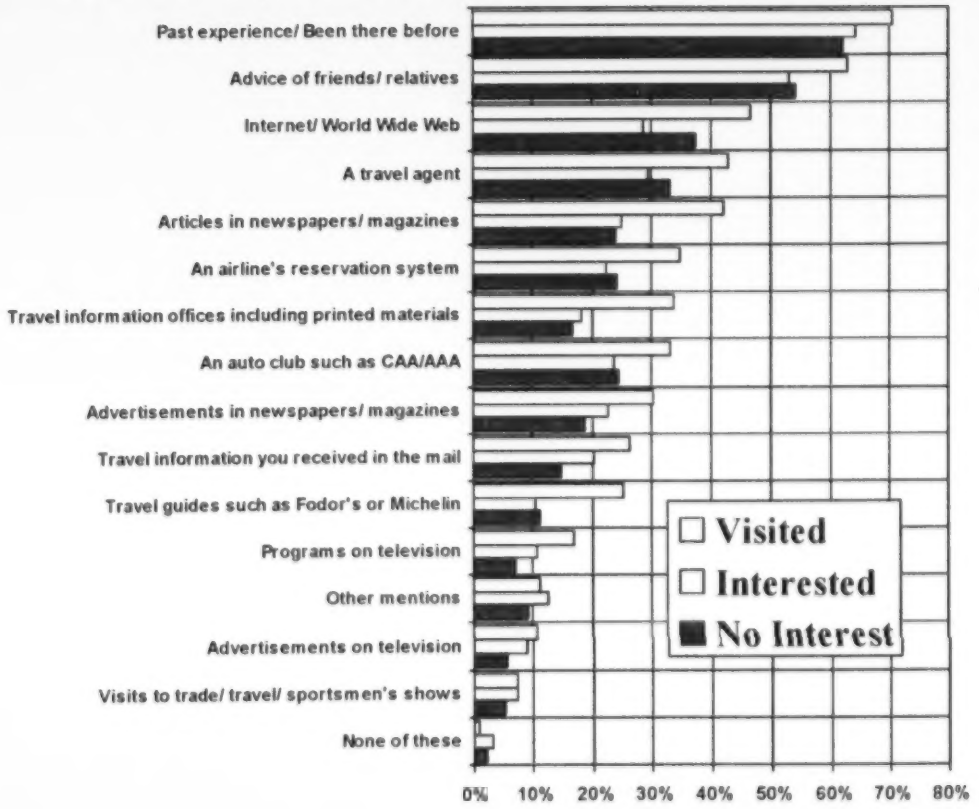
Those who visited a horticultural attraction while on a trip during the past two years were also more likely to have taken various tours, especially scenic bus tours in the country or city, tours of small towns, and coastal drives using their own personal vehicle. This association suggests that including horticultural attractions as part of an overnight scenic bus tour will be effective marketing.

Technical Note

This analysis is based on a factor analysis of the overnight tours taken during the past two years. See Appendix Seven for a description of the individual items associated with each of these factor scores. The factor scores for each dimension are determined by the weighted sum of all items. The weight for each item is determined by how much the item is correlated with the overall factor score. Factor scores are standardized with an average of "0" and a standard deviation of "1". A value of "0" means that the travellers in the group exhibited an average tendency to participate in a given type of touring activity. Progressively more positive values indicate that the travellers in the group were progressively more likely to have participated in a given type of touring activity. Progressively more negative values indicate that the travellers within the group were progressively less likely to have participated in a given type of touring activity.

Sources of Information Consulted to Plan Brief Vacations By Interest in Horticultural Tourism

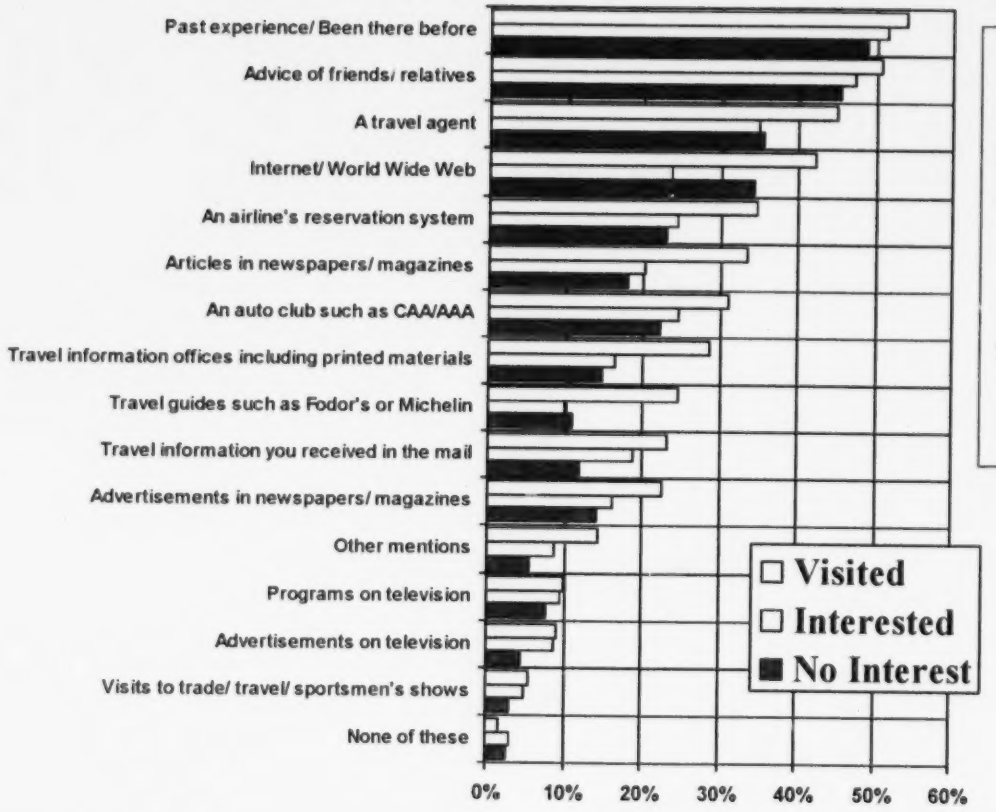
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Those who visited horticultural attractions while on a trip tend to have consulted a wider range of information sources to plan their brief vacations. While past experience and word of mouth remain key sources of information for planning a trip, the Internet, travel agents, articles in newspapers and/or magazines, airline reservation systems, travel information offices, travel guides and auto clubs were all frequently consulted. Overall, print media and the Internet appear to be more efficient than television to promote horticultural attractions.

Sources of Information Consulted to Plan Longer Vacations By Interest in Horticultural Tourism

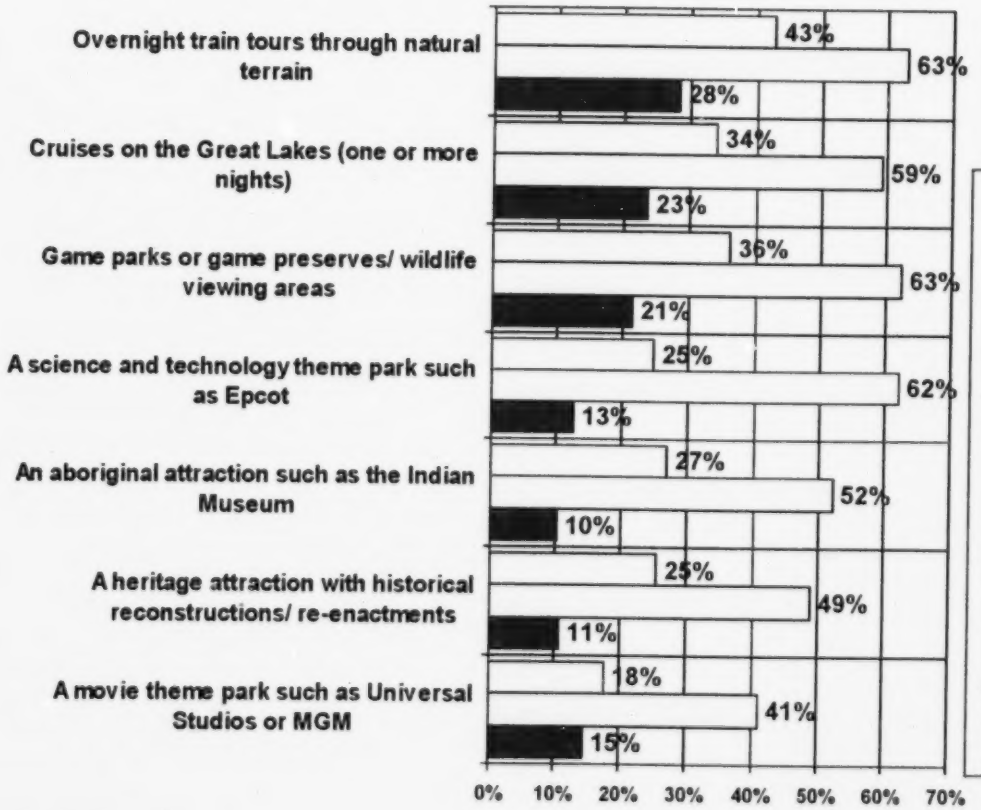
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years, Canada & U.S. (Mailback Survey)



Persons who had visited a horticultural attraction while on a trip during the past two years also consulted a larger range of information sources to plan their longer vacations. They were more likely than others to have used the Internet, newspaper and magazine travel articles and advertisements, airline reservation systems, travel information offices, and travel guides such as Fodor's or Michelin to help in their vacation planning. Overall, travel agents, the Internet and a variety of print media appear to be the most efficient channels to promote horticultural attractions as part of longer vacations.

Interest in New Tourism Products
By Interest in Horticultural Tourism (Part One of Two)

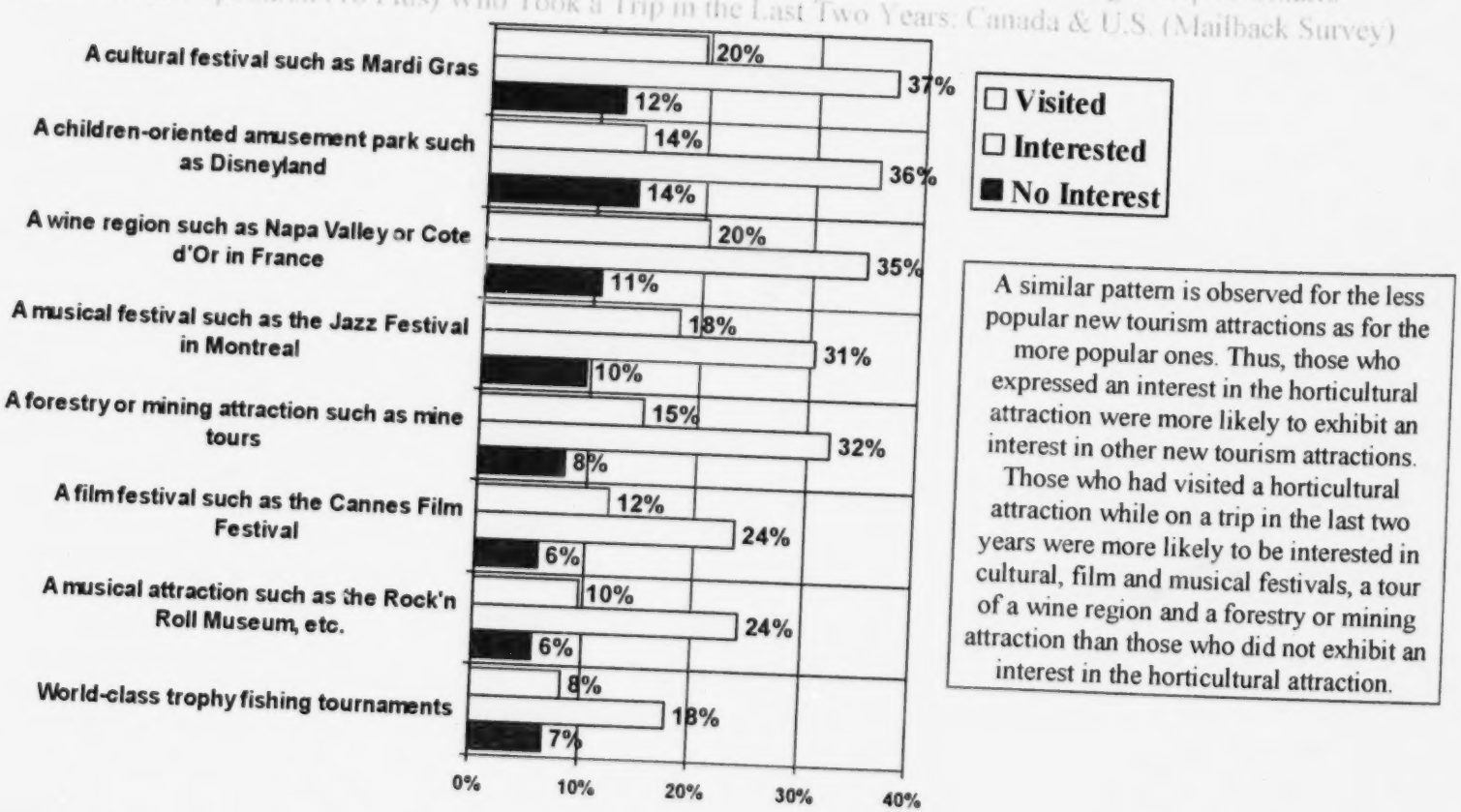
Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Respondents were asked whether each of 16 new tourism attractions would make them "a lot more interested" in taking a trip to Ontario. Most of those who exhibited an interest in the horticultural attraction also exhibited an interest in other popular attractions, especially those with a nature theme (e.g., an overnight train tour through natural terrain, a game park or game preserve with wildlife viewing areas, a cruise on the Great Lakes, an aboriginal cultural attraction). Those who visited a horticultural attraction while on a trip were less enthusiastic about the proposed new tourism attractions than those who expressed an interest in the horticultural attraction. However, they were more interested in attractions with a nature theme (e.g., an overnight train tour through natural terrain, a game park or game preserve with wildlife viewing areas) than those who did not exhibit an interest in the horticultural attraction.

Interest in New Tourism Products By Interest in Horticultural Tourism (Part Two of Two)

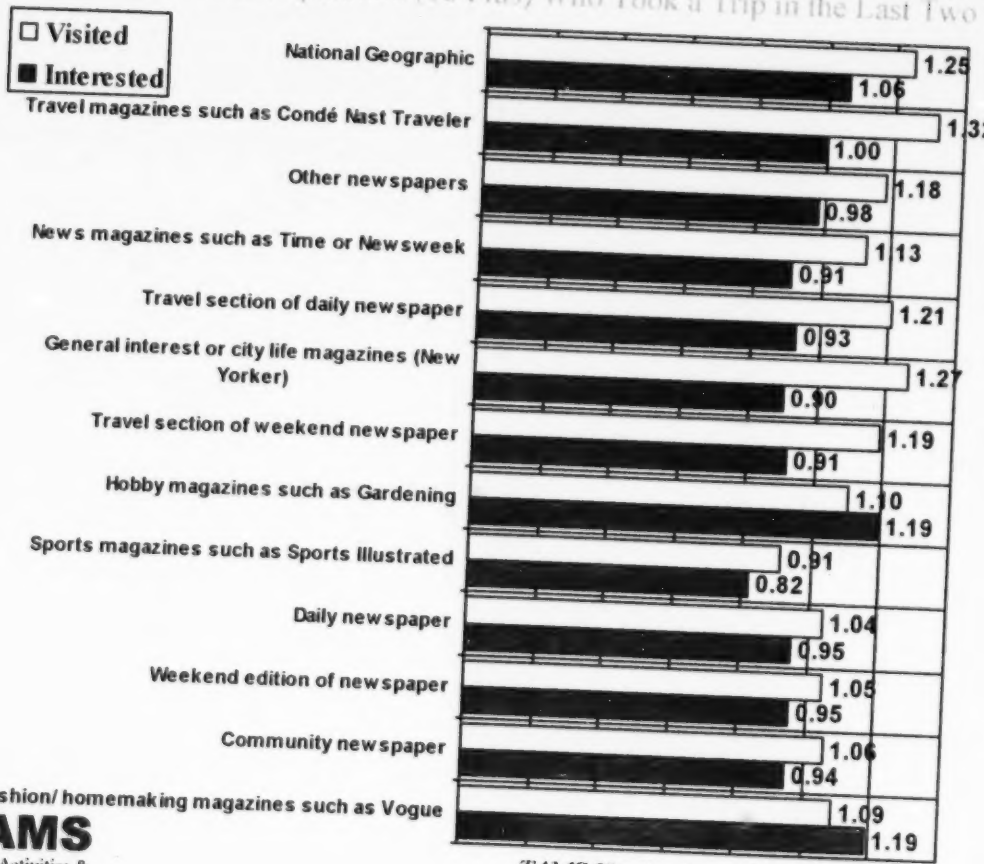
Percent Stating Attraction Would Make Them "A Lot More Interested" in Taking a Trip to Ontario
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



A similar pattern is observed for the less popular new tourism attractions as for the more popular ones. Thus, those who expressed an interest in the horticultural attraction were more likely to exhibit an interest in other new tourism attractions. Those who had visited a horticultural attraction while on a trip in the last two years were more likely to be interested in cultural, film and musical festivals, a tour of a wine region and a forestry or mining attraction than those who did not exhibit an interest in the horticultural attraction.

Media Index for Print Media: Canada & United States
By High Interest in Horticultural Tourism

Percent Reading Each Publication Type Among Those With High Interest in Horticultural Tourism
By Percent Reading Each Type of Publication in General Market
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Media indexing for types of print media (see Technical Note below) suggests that publications related to travel (e.g., National Geographic, travel magazines, travel section of daily newspapers) are the most efficient ways to reach individuals who have previously visited a horticultural attraction while on a trip in the last two years. Capturing the attention of those who just expressed an interest in horticulture attractions may be best accomplished through hobby magazines (e.g., Gardening) and fashion/homemaking magazines.

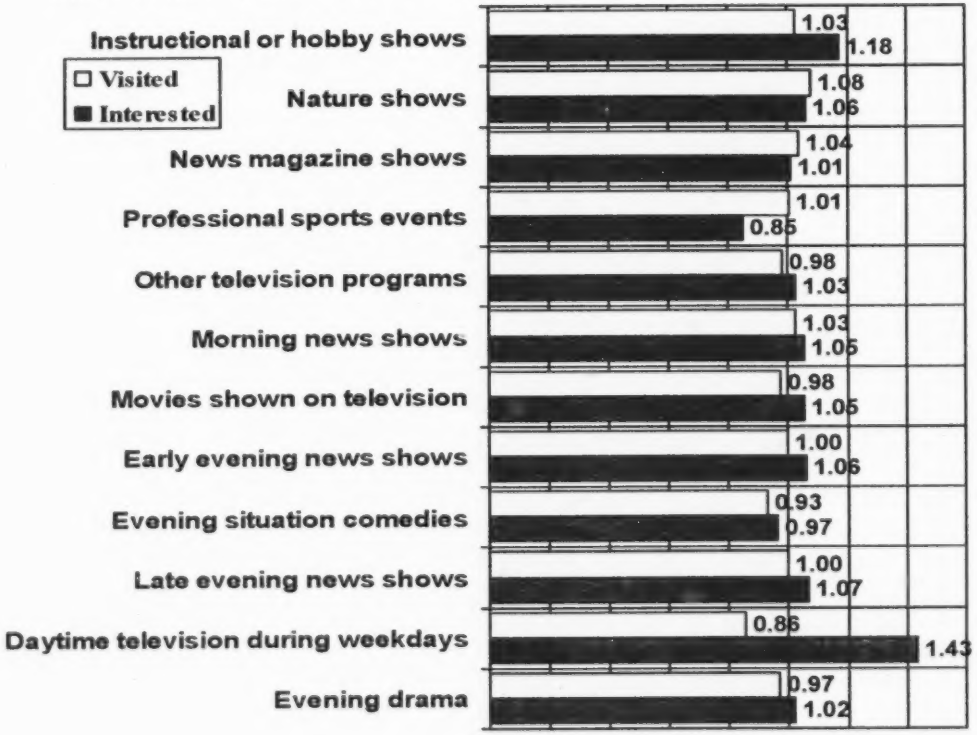
Technical Note

The Media Index is computed by dividing the percent within each segment routinely reading each publication by the percent in the total market who routinely reads each publication. A score of 1.0 means that readership is the same as the total market. Index values above 1.0 indicate that the readership is above average while index values below 1.0 indicate that readership is below average. For example, an index value of 1.2 means that people very interested in horticultural tourism were 20 % more likely to read a particular publication than the general adult population.

Media Index for Television Programs: Canada & United States
By High Interest in Horticultural Tourism

Percent Watching Each Type of Television Program Among Those With High Interest in Horticultural Tourism By Percent Watching Each Program Type in General Market

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)


Visited
Interested
Instructional or hobby shows 1.03 1.18
Nature shows 1.08 1.06
News magazine shows 1.04 1.01
Professional sports events 1.01 0.85
Other television programs 0.98 1.03
Morning news shows 1.03 1.05
Movies shown on television 0.98 1.05
Early evening news shows 1.00 1.06
Evening situation comedies 0.93 0.97
Late evening news shows 1.00 1.07
Daytime television during weekdays 0.86 1.43
Evening drama 0.97 1.02

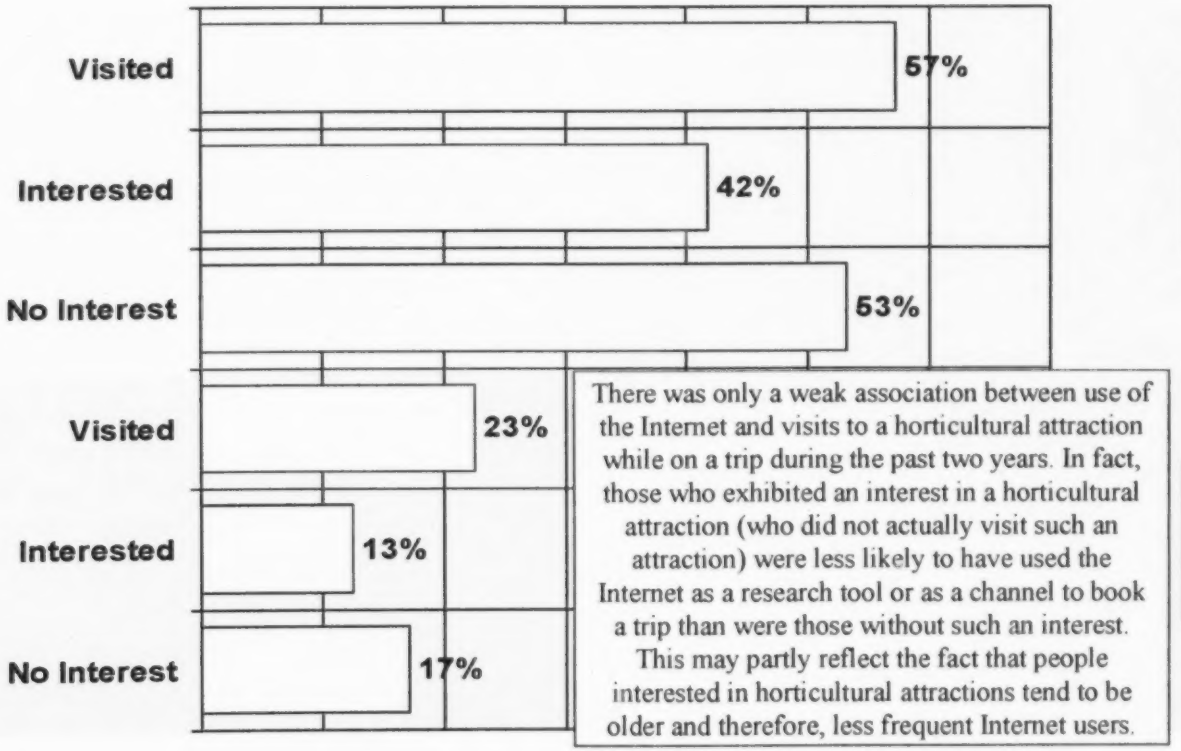
Those who visited a horticultural attraction while on a trip were slightly more likely than the average respondent to watch nature shows or instructional or hobby shows on television. They were much less likely to watch daytime television during weekdays. Conversely, those with an interest in horticultural attractions were much more likely to watch daytime television and instructional or hobby shows. Overall, television is a less effective way to promote horticultural attractions, since print media is much more likely to be used for vacation planning.

Technical Note

The Media Index is computed by dividing the percent within each segment routinely viewing each program type by the percent in the total market who routinely views each program type. A score of 1.0 means that viewership is the same as the total market. Index values above 1.0 indicate that the viewership is above average while index values below 1.0 indicate that viewership is below average. For example, an index value of 1.2 means that people very interested in horticultural tourism were 20 % more likely to watch a particular program type than the general adult population.

Percent Using Internet and Booking At Least One Trip Using the Internet
By Interest in Horticultural Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years: Canada & U.S. (Mailback Survey)



Uses Internet For Research (Any Topic)

Booked Trip Using Internet (Last Two Years)

There was only a weak association between use of the Internet and visits to a horticultural attraction while on a trip during the past two years. In fact, those who exhibited an interest in a horticultural attraction (who did not actually visit such an attraction) were less likely to have used the Internet as a research tool or as a channel to book a trip than were those without such an interest. This may partly reflect the fact that people interested in horticultural attractions tend to be older and therefore, less frequent Internet users.

Destination Image Mapping

- Technical Explanation -

Respondents were asked to assess the image of Canada and Ontario on a 10-point rating scale for 25 image attributes. These ratings were factor analysed to identify general image dimensions upon which Canada and Ontario were evaluated (See Appendix Eight for more details). The values of Canada and Ontario were plotted on a destination map to indicate the positioning of Canada for each type of respondent. If Canada or Ontario is found in the upper left quadrant, it is considered to offer excellent opportunities to experience culture and entertainment activities, but less likely to provide opportunities to experience nature or participate in outdoor activities. If Canada or Ontario is found in the lower right quadrant, it is considered to offer excellent opportunities to experience nature and participate in outdoor activities, but fewer opportunities for cultural experiences or entertainment. When Canada or Ontario is found in the upper right quadrant, it is perceived as a hybrid destination offering opportunities for both nature/outdoor experiences and culture/entertainment experiences. On the other hand, when Canada or Ontario is found in the lower left quadrant, it is either not well known or has weak imagery on both image dimensions.

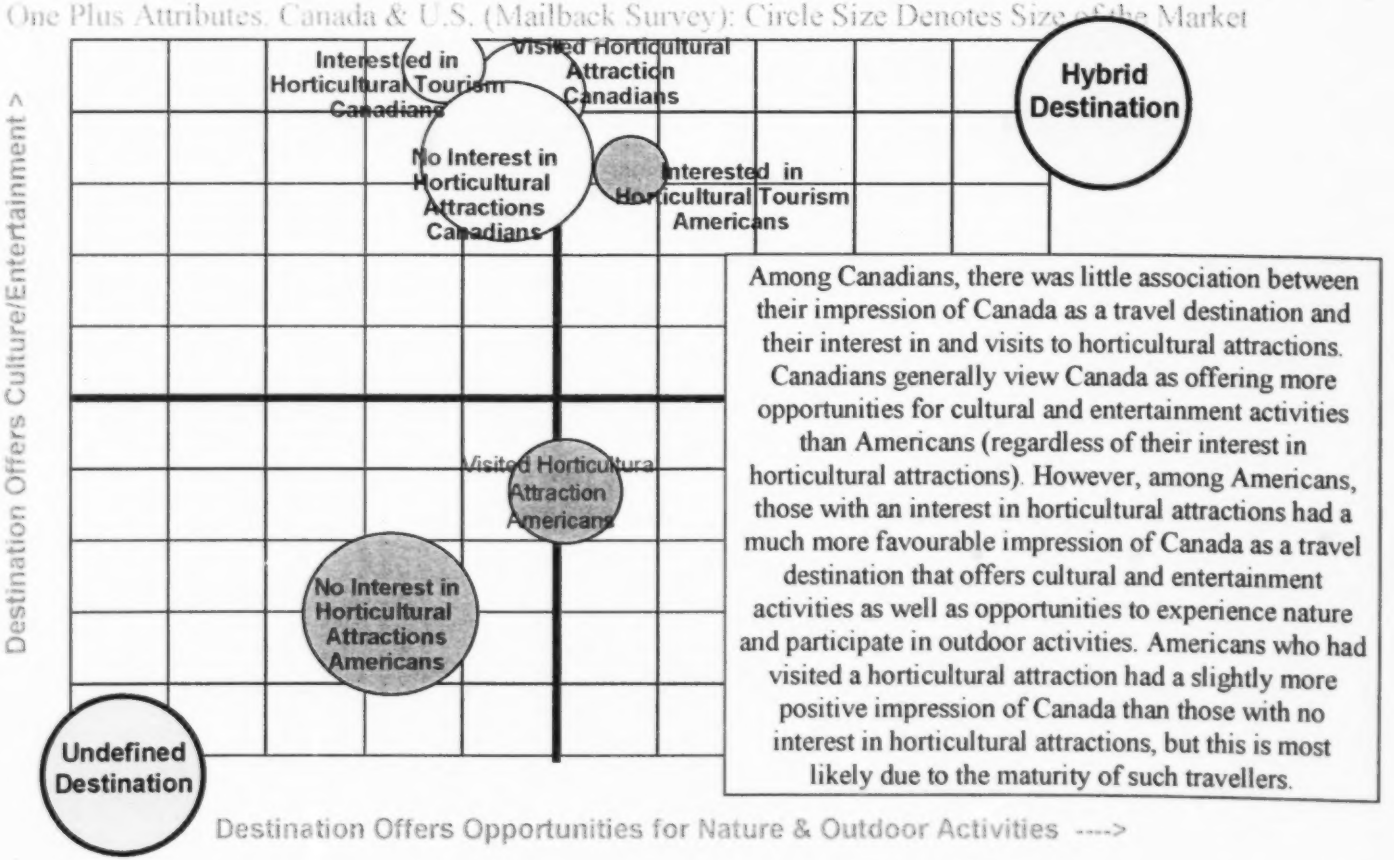
Hybrid Destination
Culture & Entertainment Only
Culture/ Entertainment & Nature/Outdoor Activities
Neither Culture/ Entertainment nor Nature/Outdoor Activities
Nature & Outdoor Activities Only
Undefined Destination
Destination Offers Opportunities for Culture & Entertainment ---->
Destination Offers Opportunities for Nature & Outdoor Activities ---->

Canada and United States

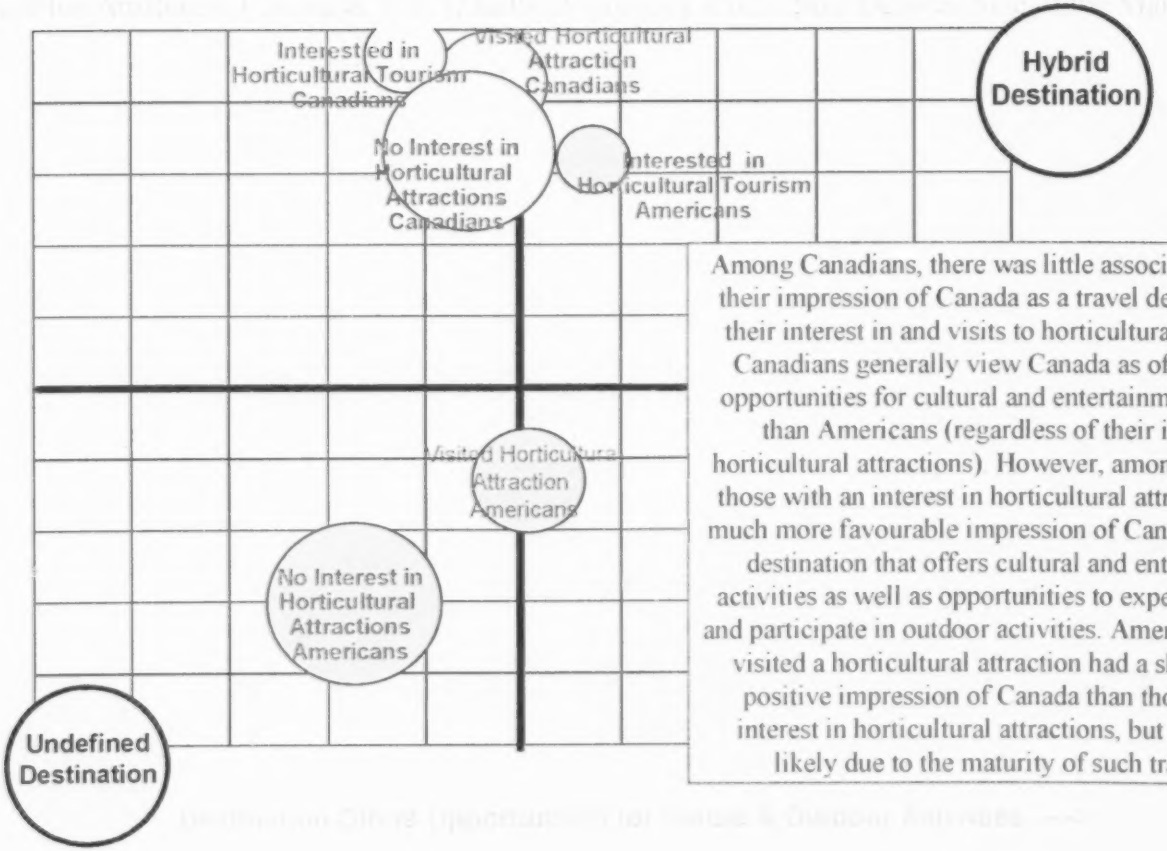
Canadian Vacation Imagery

By Interest in Horticultural Tourism

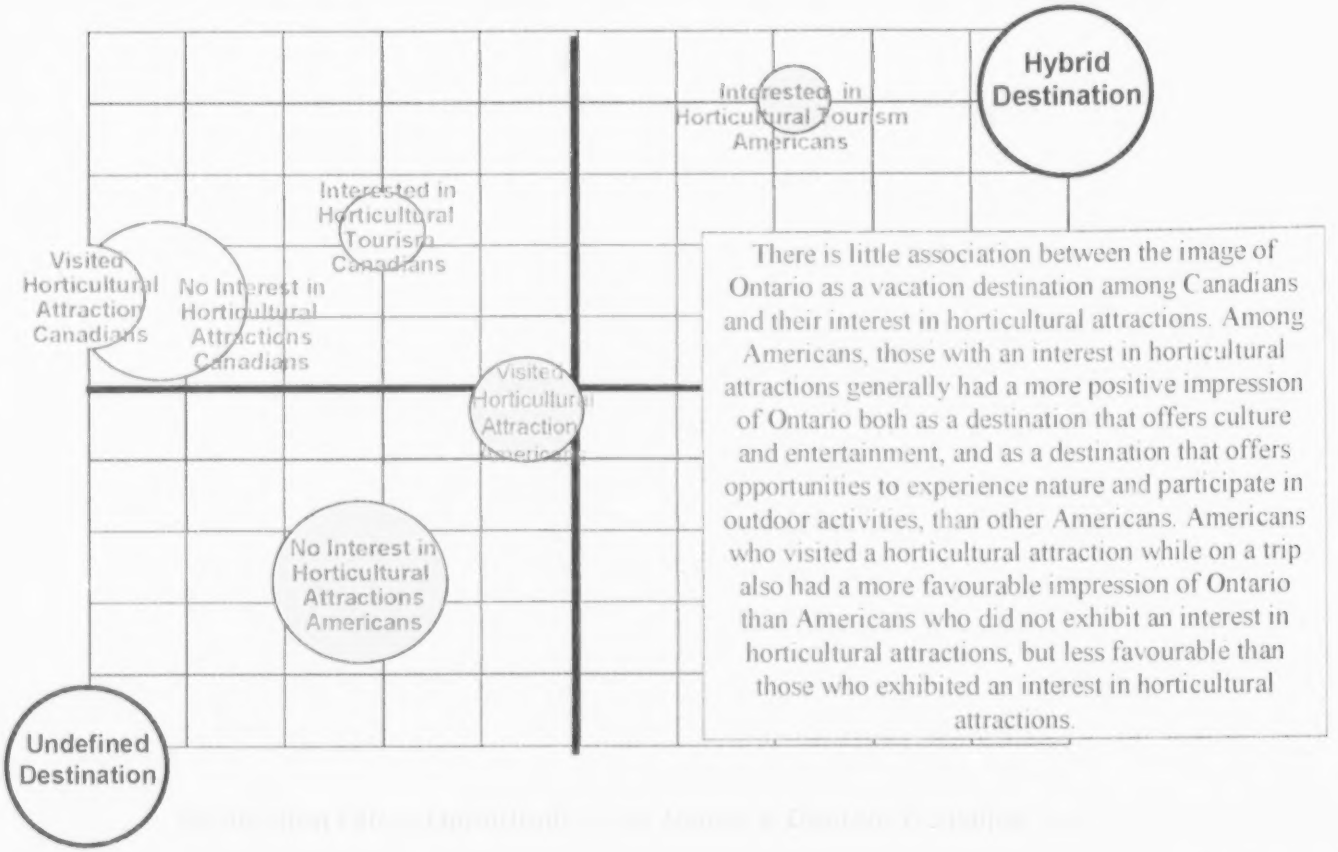
Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Canada On One Plus Attributes. Canada & U.S. (Mailback Survey): Circle Size Denotes Size of the Market


Interested in Horticultural Tourism Canadians
Visited Horticultural Attraction Canadians
Hybrid Destination
No Interest in Horticultural Attractions Canadians
Interested in Horticultural Tourism Americans
Visited Horticultural Attraction Americans
No Interest in Horticultural Attractions Americans
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities --->

Among Canadians, there was little association between their impression of Canada as a travel destination and their interest in and visits to horticultural attractions. Canadians generally view Canada as offering more opportunities for cultural and entertainment activities than Americans (regardless of their interest in horticultural attractions). However, among Americans, those with an interest in horticultural attractions had a much more favourable impression of Canada as a travel destination that offers cultural and entertainment activities as well as opportunities to experience nature and participate in outdoor activities. Americans who had visited a horticultural attraction had a slightly more positive impression of Canada than those with no interest in horticultural attractions, but this is most likely due to the maturity of such travellers.


Interested in Horticultural Tourism Canadians
Visited Horticultural Attraction Canadians
Hybrid Destination
No Interest in Horticultural Attractions Canadians
Interested in Horticultural Tourism Americans
Visited Horticultural Attraction Americans
No Interest in Horticultural Attractions Americans
Undefined Destination

Among Canadians, there was little association between their impression of Canada as a travel destination and their interest in and visits to horticultural attractions. Canadians generally view Canada as offering more opportunities for cultural and entertainment activities than Americans (regardless of their interest in horticultural attractions) However, among Americans, those with an interest in horticultural attractions had a much more favourable impression of Canada as a travel destination that offers cultural and entertainment activities as well as opportunities to experience nature and participate in outdoor activities. Americans who had visited a horticultural attraction had a slightly more positive impression of Canada than those with no interest in horticultural attractions, but this is most likely due to the maturity of such travellers.

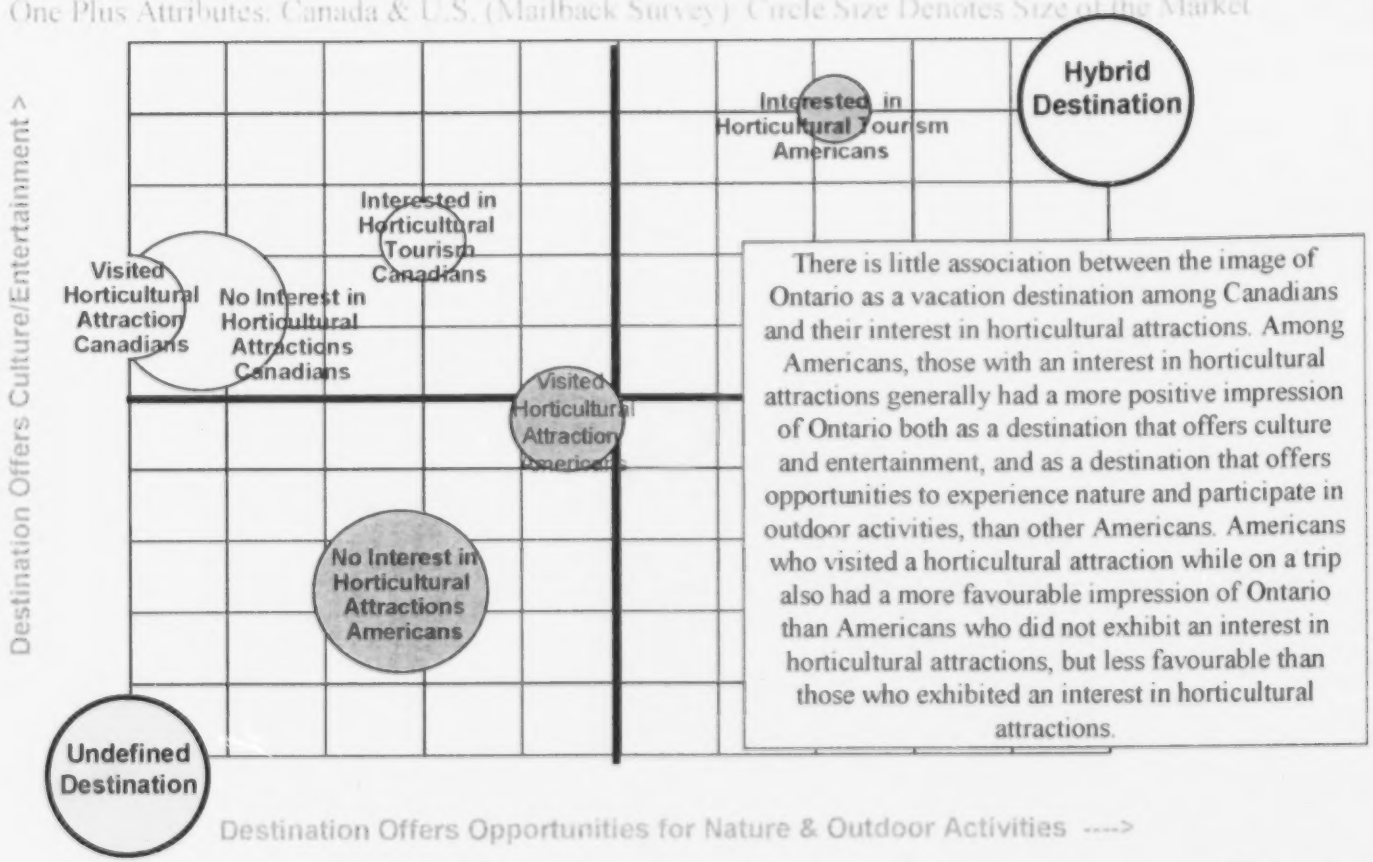

Hybrid Destination
Interested in Horticultural Tourism Americans
Interested in Horticultural Tourism Canadians
Visited Horticultural Attraction Canadians
No Interest in Horticultural Attractions Canadians
Visited Horticultural Attraction Americans
No Interest in Horticultural Attractions Americans
Undefined Destination
There is little association between the image of Ontario as a vacation destination among Canadians and their interest in horticultural attractions. Among Americans, those with an interest in horticultural attractions generally had a more positive impression of Ontario both as a destination that offers culture and entertainment, and as a destination that offers opportunities to experience nature and participate in outdoor activities, than other Americans. Americans who visited a horticultural attraction while on a trip also had a more favourable impression of Ontario than Americans who did not exhibit an interest in horticultural attractions, but less favourable than those who exhibited an interest in horticultural attractions.

Canada and United States

Ontario Vacation Imagery

By Interest in Horticultural Tourism

Base: Total Population (18 Plus) Who Took a Trip in the Last Two Years Able to Rate Ontario On One Plus Attributes: Canada & U.S. (Mailback Survey) Circle Size Denotes Size of the Market


Hybrid Destination
Interested in Horticultural Tourism Americans
Interested in Horticultural Tourism Canadians
Visited Horticultural Attraction Canadians
No Interest in Horticultural Attractions Canadians
Visited Horticultural Attraction Americans
No Interest in Horticultural Attractions Americans
Undefined Destination
Destination Offers Culture/Entertainment >
Destination Offers Opportunities for Nature & Outdoor Activities ---->

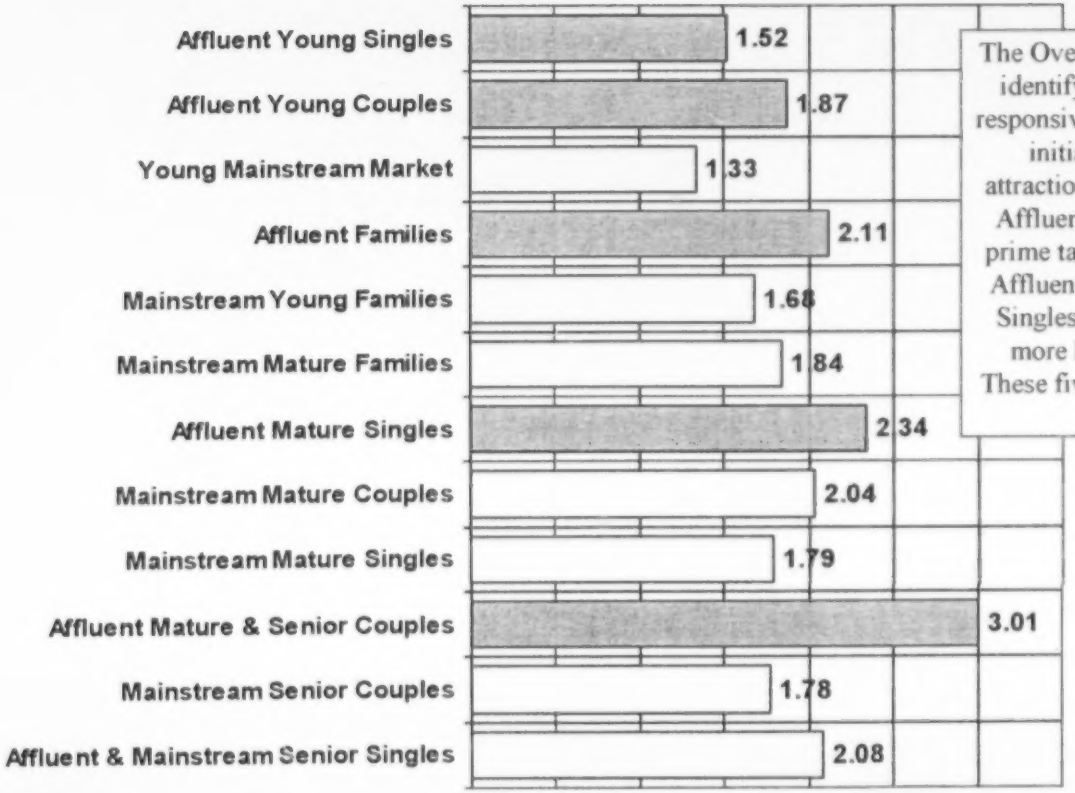
There is little association between the image of Ontario as a vacation destination among Canadians and their interest in horticultural attractions. Among Americans, those with an interest in horticultural attractions generally had a more positive impression of Ontario both as a destination that offers culture and entertainment, and as a destination that offers opportunities to experience nature and participate in outdoor activities, than other Americans. Americans who visited a horticultural attraction while on a trip also had a more favourable impression of Ontario than Americans who did not exhibit an interest in horticultural attractions, but less favourable than those who exhibited an interest in horticultural attractions.

Overall Market Potential

Interest in Horticultural Tourism: Canada

Interest in Horticultural Tourism By Likelihood of Travel Within Canada (Indexed)

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



The Overall Market Potential Index is constructed to identify those segments that are most likely to be responsive to marketing, advertising and promotional initiatives designed to promote horticultural attractions. This index indicates that, in Canada, the Affluent Mature and Senior Couples represent the prime target market for such promotional activities. Affluent Mature Singles, Affluent Families, Senior Singles, and Mainstream Mature Couples are also more likely to be responsive to such initiatives. These five segments represent 35% of the total adult (18 plus) population in Canada.

Technical Note

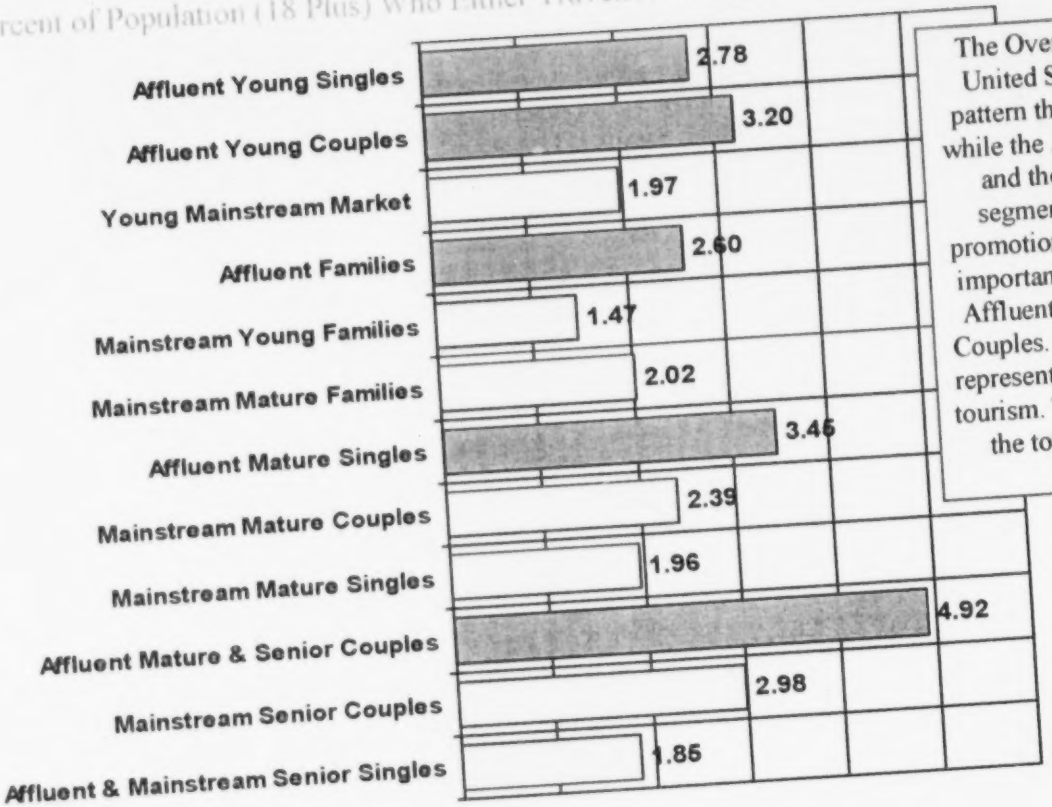
The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in horticultural tourism related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.

Overall Market Potential

Interest in Horticultural Tourism:United States

Interest in Horticultural Tourism By Likelihood of Travel To Canada (Indexed)

Percent of Population (18 Plus) Who Either Travelled in Last Two Years or Intends to Travel in Next Two Years



The Overall Market Potential Index for the United States shows a somewhat different pattern than that observed for Canada. Thus, while the Affluent Mature and Senior Couples and the Affluent Mature Singles are the segments most likely to be responsive to promotions for horticultural attractions, other important segments in the U.S. tend to be the Affluent Young Singles and Affluent Young Couples. The Mainstream Senior Couples also represent an important market for horticultural tourism. These five segments represent 25% of the total adult (18 plus) population in the United States.

Technical Note

The Overall Market Potential Index is computed by multiplying the percent who exhibit an interest in horticultural tourism related vacation products and the percent likely to take a trip in Canada during the next two years. This index is standardized such that values above 1.0 reflect above average market potential and values below one reflect below average market potential.